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EDC RCWeb 5.50 User Manual

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1 Introduction

1.1 About This Manual

Welcome to all EDC RC Web users

This manual is meant as a user reference to **EDC RCWeb**. It will help you to perform your daily operations easily and efficiently; wether it be for searching, ordering, viewing, adding items, printing labels, or any other operation, this manual will guide you through it.

Conventions used in this manual

This manual was created for both online viewing and print. When references to other topics are made throughout the manual, they are made with hyperlinks to enable you to browse to the referenced topic with a simple click of the mouse.

A page icon with the page number inside is always located to the right side of the hyperlink to reference page numbers when the manual is printed. The page icons looks something like this:

In this case it would mean that the referenced topic can be found on page 25 of the manual.

Example: Here is a reference to the start page of the Inventory 12 section of this manual.

Prerequisites and technical issues

You need to have the "Java Runtime Environment" (JRE) installed on your local computer in order to use the image scanning feature of RCWeb. The **minimum version required is "JRE 6 Update 10"** although at the time of writing this manual, they were already at version "JRE 6 Update 13". Go to "http://java.sun.com" to download the package or click here to access the download page directly.

Also note that even though RCWeb works with the majority of internet browsers in use today, its performance is at its best when using either Internet Explorer 8, Firefox 3 or Google Chrome.

If at any point you are having some technical difficulties accessing or using the software with issues not covered in this manual, you should seek help at your Record Center.

Your Feedback

Your feedback and opinion is very important to us. If you find errors in the document or have suggestions on how to improve it, please feel free to send us your comments at support@docudatasoft.com.

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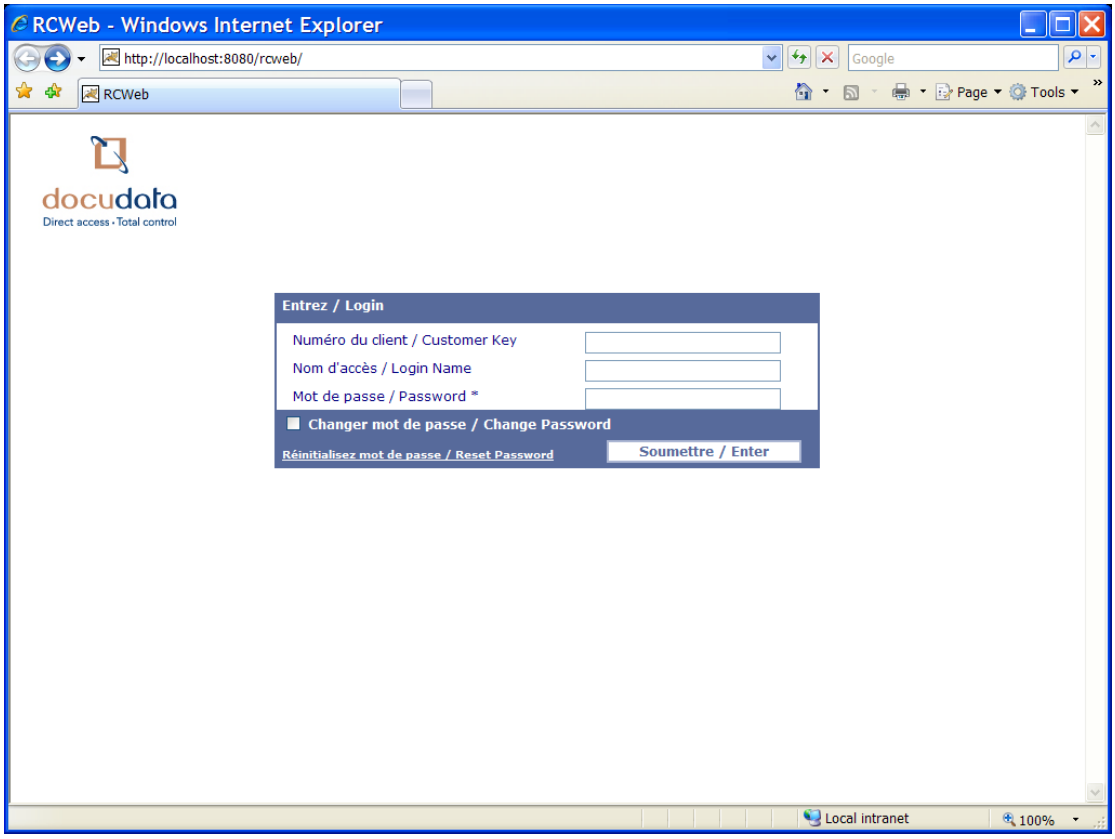
1.2 Obtaining a Username and Password

In order to use **EDC RCWeb**, you must be authorized both with your record center and your company. You will need a user name and password to access the software. If you don't have them already please consult your record center.

1.3 Signing In or Logging Out of RCWeb

RCWeb is accessed via the internet. If you don't already have the internet address of RCWeb please ask your record center.

The first thing you see when accessing RCWeb is the login page like so:



Note: You might see a logo of your record center in the top left of the window instead of the DocuData logo which is normal.

Logging into RCWeb

1- To login you simply enter your customer key, login name and password in the provided fields and click on the "Enter" button.

2- If you want to change your password at the same time that you're logging in, click the "Change Password" checkbox and other fields will appear like so:

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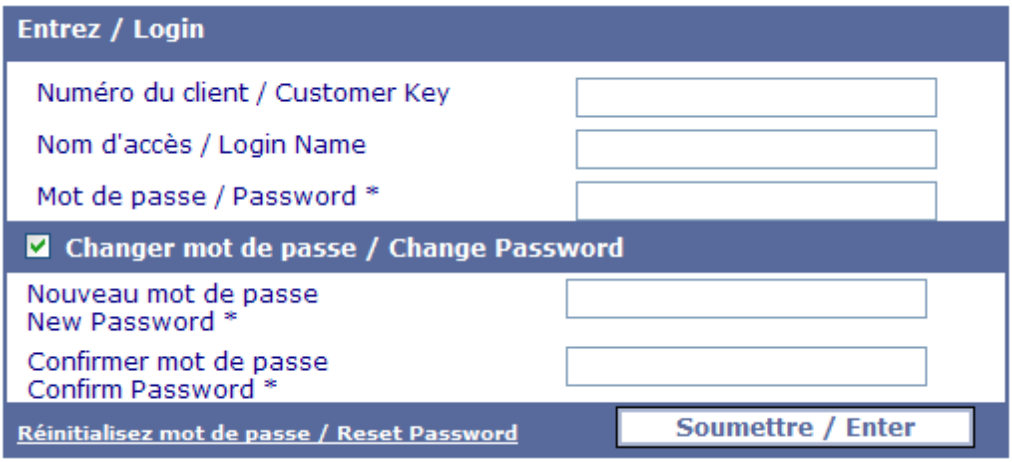
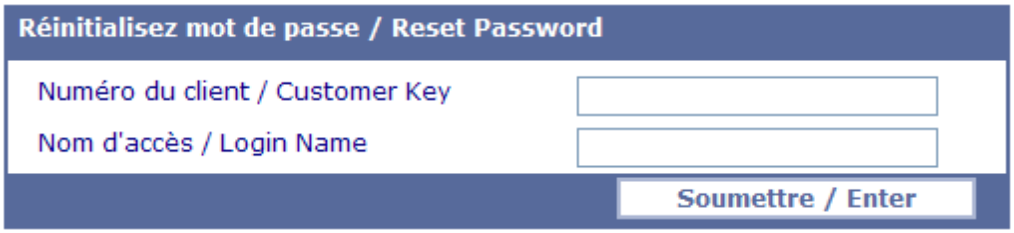

Entrez / Login
Numéro du client / Customer Key
Nom d'accès / Login Name
Mot de passe / Password *
Changer mot de passe / Change Password
Nouveau mot de passe
New Password *
Confirmer mot de passe
Confirm Password *
Réinitialisez mot de passe / Reset Password
Soumettre / Enter

Here you would simply enter your new password in the two fields provided as well as regular credentials above it. Then press the "Enter" button to login and change your password all at once.

3- If you forgot your password and need to reset it simply click on the link "Reset Password" next to the "Enter" button. When doing so you will be brought to another page in which you will be asked to enter your customer key and login name:



After pressing "Enter" you should get a message to the effect that an email message has been sent to you:

If for some reason the email didn't go through, you should get a message like so:

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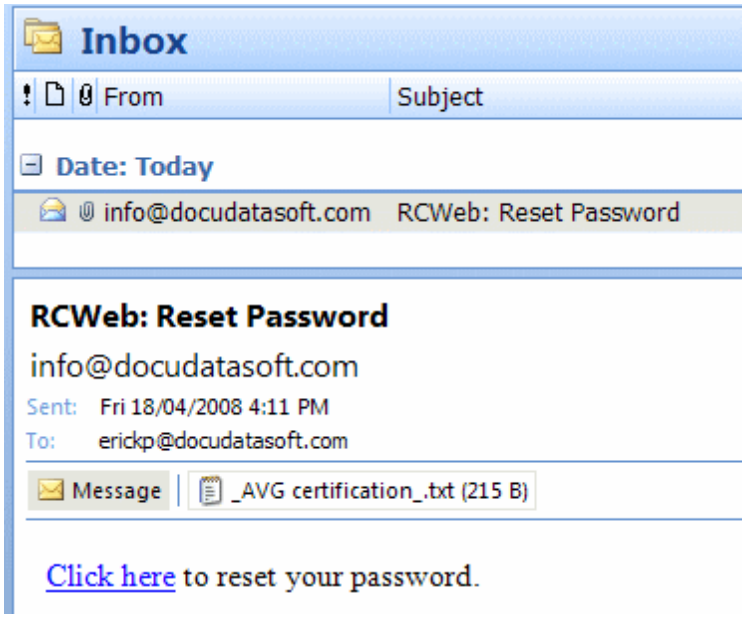
In which case you should contact your record center and letting them know. As the message says, it probably is just that you have no email address configured in your account at the record center.

Once the email goes through you will receive it in your mailbox and it should look something similar to this:



When you click on the link in the email, you will be directed to a page on the web where you can choose a new password for yourself like so:

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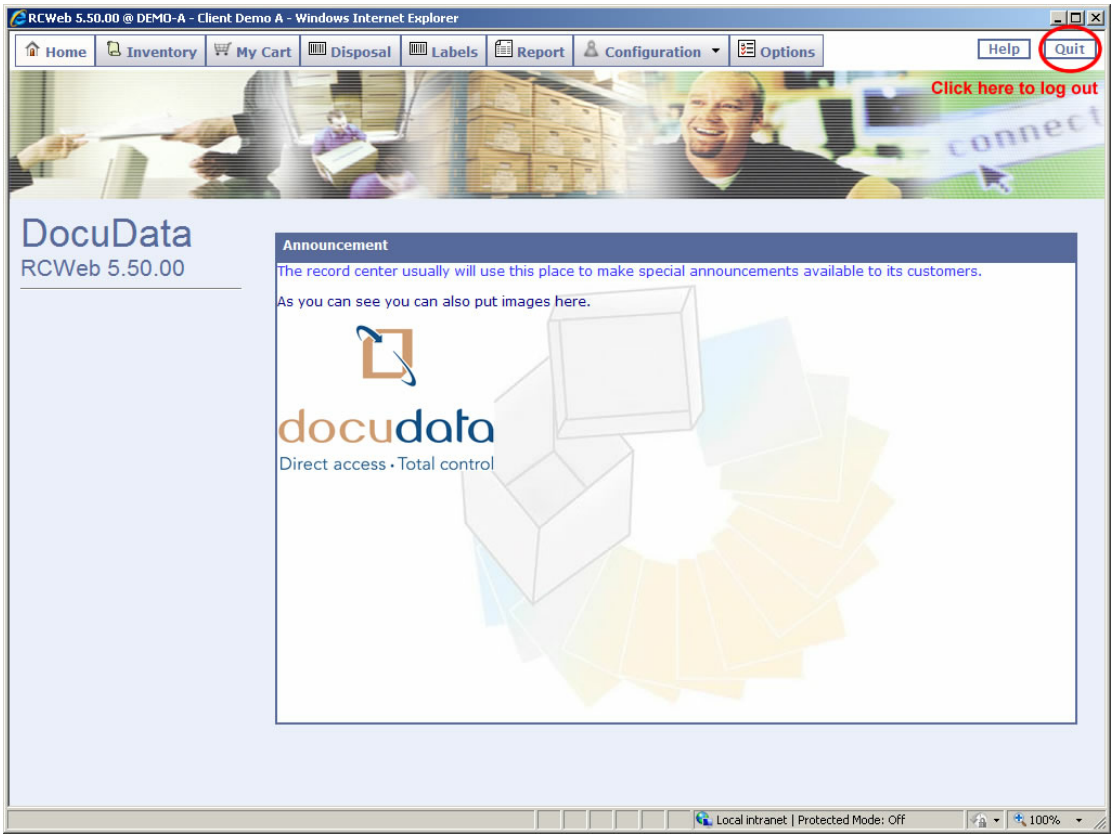
Logging Out of RCWeb

Once you're logged into RCWeb your screen will look like this:



To log out simply click on the "Quit" button on the top right of the window.

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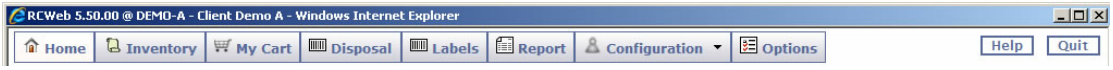
1.4 Navigating in EDC RCWeb

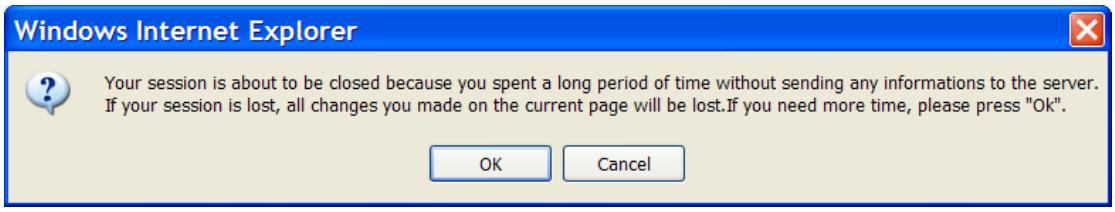
- Navigation from page to page must be done solely using the buttons, links, and icons on the pages themselves. You cannot use the "back" or "forward" buttons on your browser to navigate.

- At the top of each page in **EDC RCWeb**, there is a **button bar** that allows the user to navigate between the different modules:



Button Bar

- For security reasons, a session will "time out" after 15 minutes. If a session does not have any activity for more than 15 minutes, an error message will be displayed like so:


Windows Internet Explorer
Your session is about to be closed because you spent a long period of time without sending any informations to the server.
If your session is lost, all changes you made on the current page will be lost.If you need more time, please press "Ok".
OK
Cancel

At which point you can choose to continue your session or not.

Note: This "time-out" can be changed (between 5 and 715 minutes) by your record center if needed.

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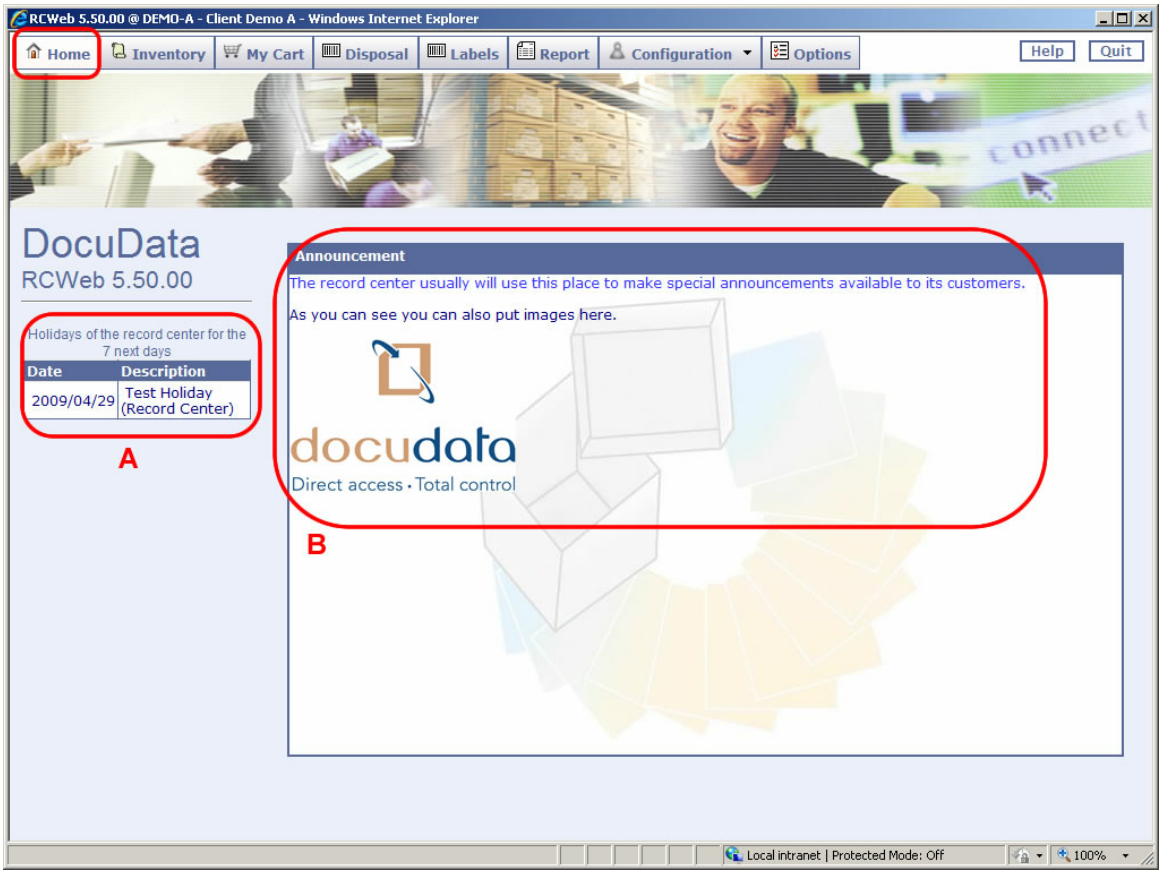
2 Home Tab

2.1 Home

The "Home" tab is the first window displayed after you have successfully logged into RCWeb. It shows the different holidays (A) for the next 7 days and announcements (B) of the record center:



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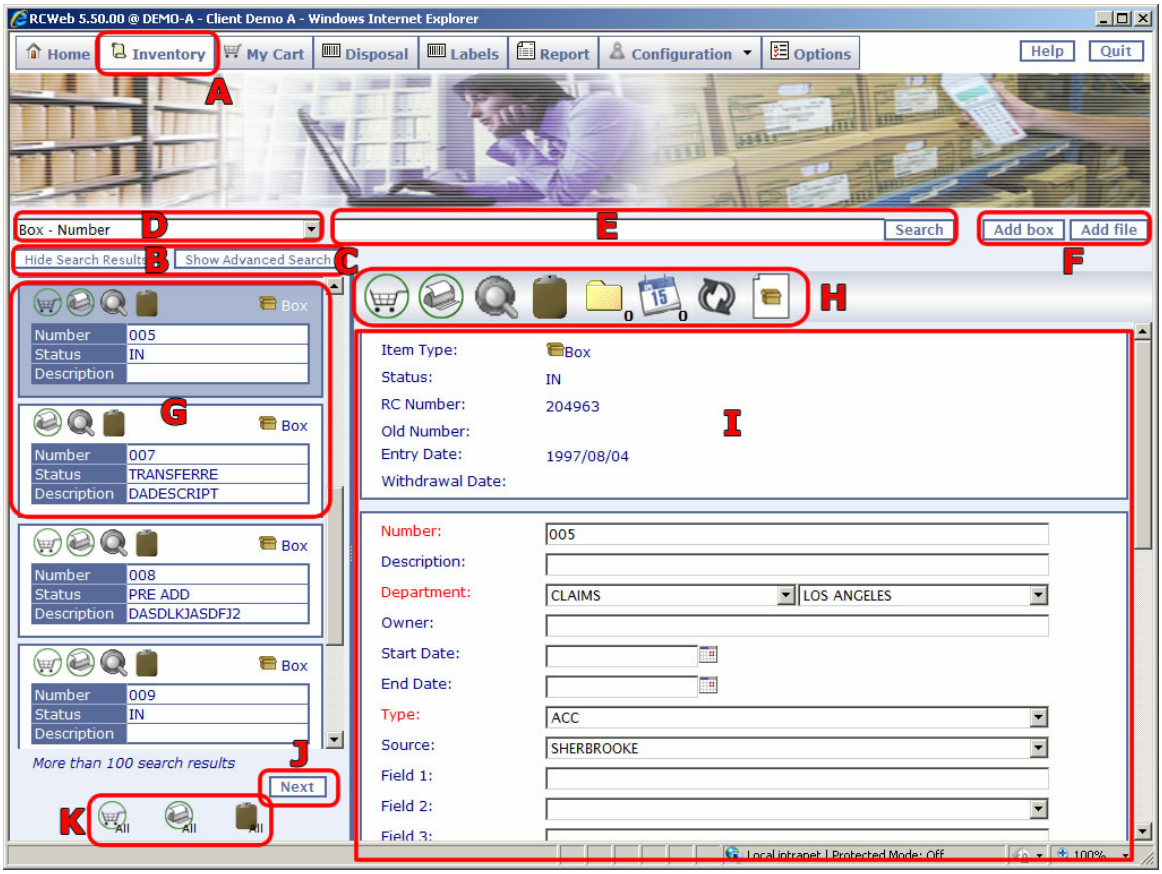
3 Inventory Tab

3.1 Inventory Tab Layout

The inventory tab is used to:

- Add boxes and files to your inventory.
- Add boxes and files to a work, favorite and/or label print list.
- Query and edit information of your current inventory.
- Order and return inventory to and from your record center.

The following set of screenshots will explain the different parts of the inventory tab. Under each screenshot there is a legend (referring to the RED letters on the screenshot) to explain the different parts of the screen.



Inventory Tab

In the picture above:

A. This tab is highlighted compared to the other ones to tell you where you are at any given time.

B. With this button you can hide or show the search results as seen by the letter "G" on the picture above. The button will change its label from "Hide Search Results" to "Show Search Results" depending on wether the search results are shown or not. Note that the search results can be moved to any side of the screen (Top, Bottom, Left or Right) if you so wish. You can configure this in

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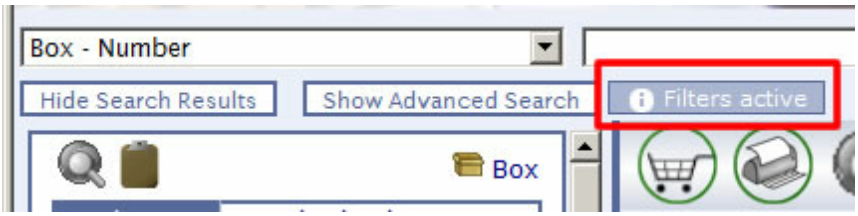
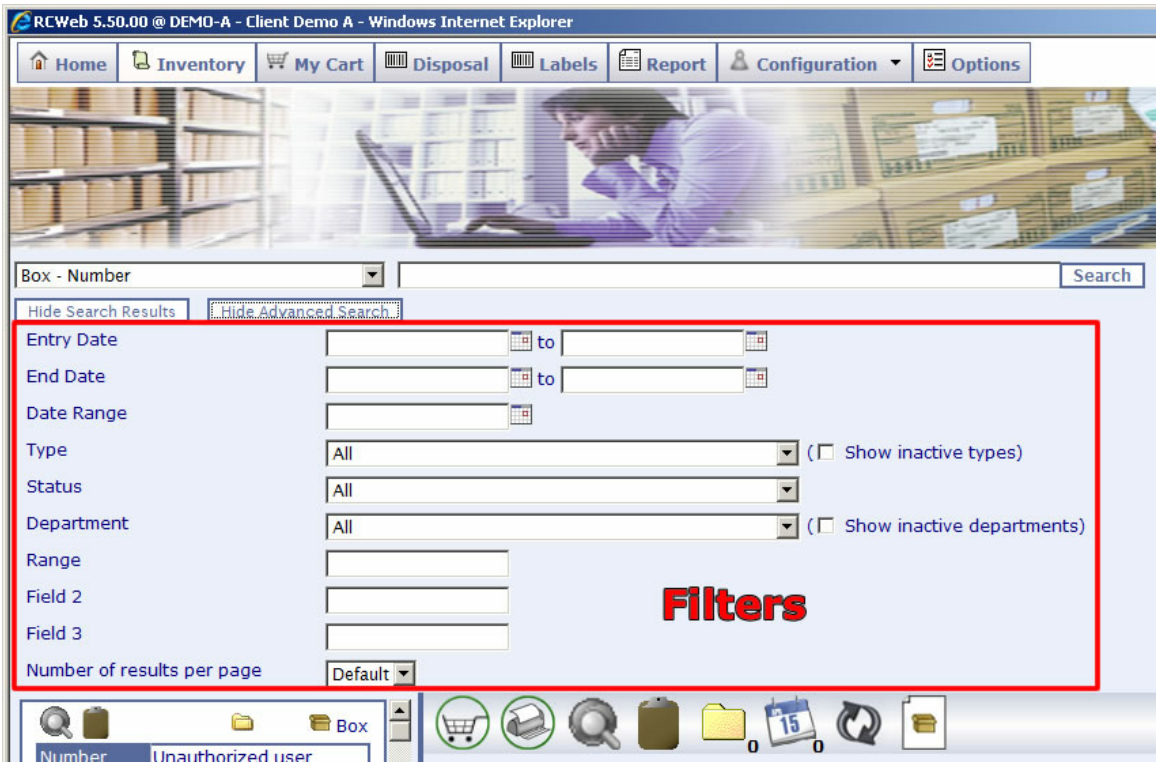
the "Options" 69 tab.

C. Just like in point B above, this button "hides or shows" the additional filters (department, type etc..) that you can use when making a search. In the screenshot above the filters are currently hidden. Refer to the screenshot below to see an example with filters shown.

Note: The last filters used are always remembered when you log back in so if some search don't seem to show something you expect please have a look at the filters to make sure they are configured the way you want. Also whenever the filters are active a little notice flag appears next to this button like so:





Search Filters

D. This drop-down shows the different "search types" you can use when searching your inventory. For example you can choose to search by number, description or use the full text search facility. The choice is not limited to these 3 types by the way.

E. This is the place where you enter your search keywords. You click on the "search" button to start your search. If there is some results to your search they will appear in the search results column (if not hidden as per point B above) which is currently located on the left side of the screen in this example.

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F. These are the buttons you use to add a new box or file to your inventory. You will get more info on this in the section "Adding or deleting a box or file" 24 later in this manual.

G. This is where the search results are displayed. Note that these can also be hidden or moved at any time (refer to points B & C above). The fields displayed and their order can be customized through the "Options" tab. For more info on this please refer to the section "Options Tab" 69 later in this manual.

H. This is a toolbar that lets you interact with your item in different ways. Below is an explanation of each icon.

Add to Order

This is the icon you use when you want to place your item on an order either from the record center to you or when you want to return an item to your record center. More information about the specifics of ordering is contained under the "My Cart Tab" 36 section later in this manual.

Add to Print List

This icon is used when you want to place your item's label on a print list. Then when you are ready to print your labels you browse to the "Labels" tab and print them from there. More information about printing labels is contained under the "Labels Tab" 53 section later in this manual.

Add to Favorites

This icon enables you to "bookmark" or place an item on a list of favorites. You can then go back to your favorites to quickly access the items you've placed there. The favorites are accessed via the "search-types" drop-down box as explained in point D above.

Add to Work List

This icon enables you to put items on or off your work list. Work lists can be later used to populate disposal lists. Refer to the "Disposal" 46 section later in this manual for more info on disposals.

Files

This icon indicates if and how many files are located inside the box currently displayed. Clicking on this icon will bring you directly to the files section of the page.

Tape Schedule

This icon indicates if and how many dates are scheduled for the current box or tape. Clicking on this icon will bring you directly to the schedule section of the page.

Notes

This icon indicates if this item currently has some notes attached to it. Clicking on the icon will bring you to the notes section of the page where you will be able to view them.

Refresh

Use this icon if you need to refresh the current view of the item. You might need to do this for example if you are working with another person from another computer on the same item and want to see some changes that they have made at their end.

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Print Box Details

Clicking on this icon will bring up a PDF report listing the details (fields) of the box. This is useful if you want to print the box details that you see on screen.

Note: Will need a PDF reader to view these reports. If you don't have one on your computer, you can simply download a free one from this website: http://www.foxitsoftware.com/

The following icons pertain to files only:

View the box containing this file

If you need to refer back to the box that contains this file, click on this icon.

Images

This icon indicates if the current file has some images attached to it. Clicking on the icon will bring you to the images section of the page where you will be able to view them from.

Print File Details

Just like the "Print Box Details" 15 above, this icon will bring up a PDF report listing the details (fields) of the current file. This can be useful if you need a printout of the details you see on screen.

Note: Will need a PDF reader to view these reports. If you don't have one on your computer, you can simply download a free one from this website: http://www.foxitsoftware.com/

I. This is the part of the screen where you see the details (data fields) of the currently selected item. By scrolling down this section you will find different areas of interest such as Notes, History, Files, Schedules, Images (when viewing file information only) etc..

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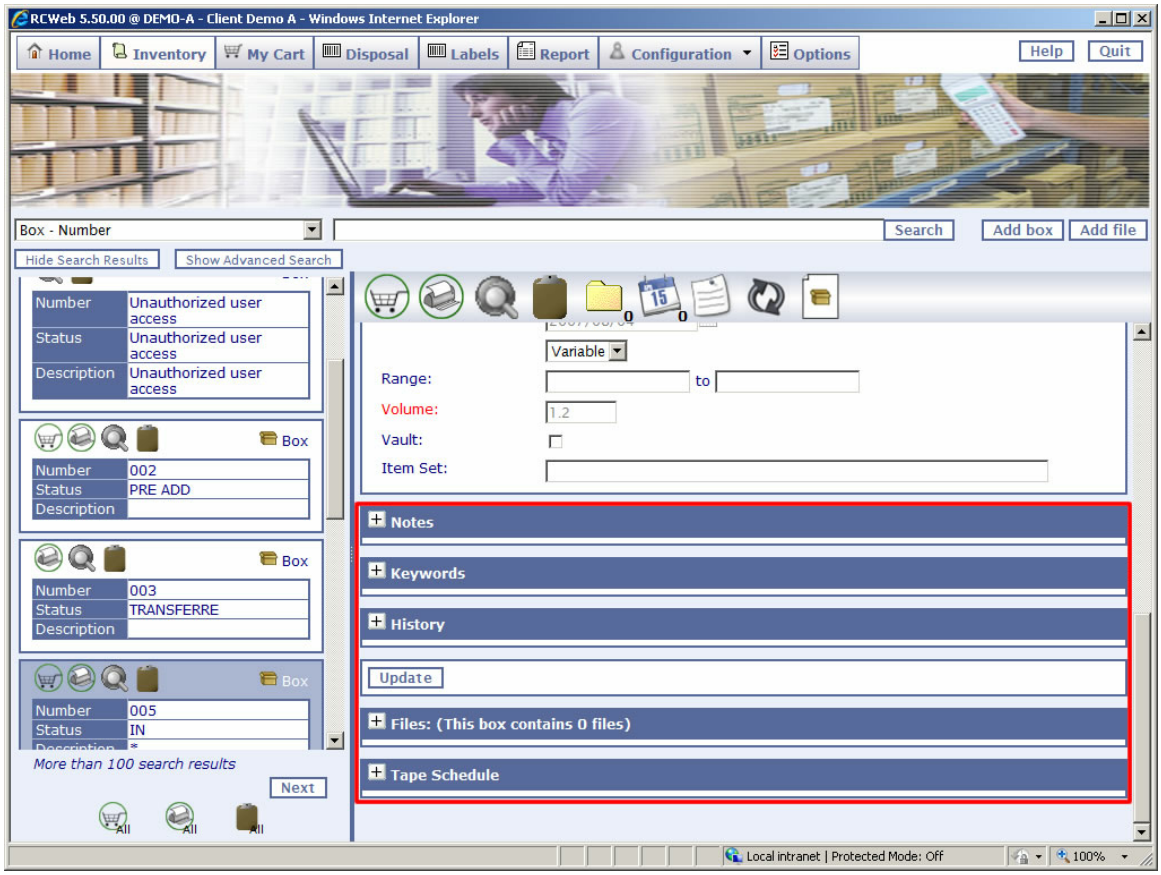

J. Here you will find a "Next" and "Previous" button that you can use to scroll up and down the search results. The maximum number of search results per page is customizable from the "Options" 69 tab. By default RCWeb is set to display 10 items per page in the search results.

K. You can use these buttons if you want to add all of the items you see in the search results at once on the labels print list, work list and/or to an order. More information about orders and label printing can be found in the "My Cart Tab" 36 and "Labels Tab" 53 section of this manual.

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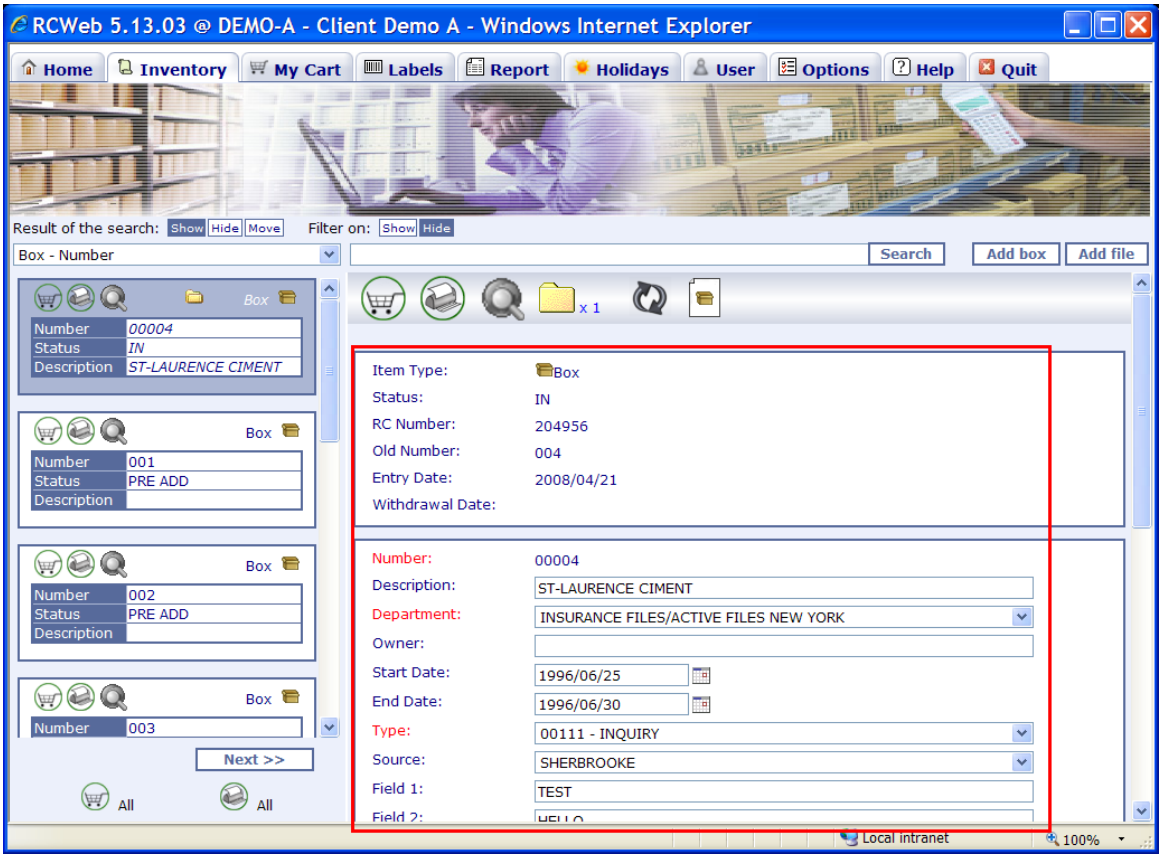
3.2 Description of the Different Fields

Here is a description of the various fields you will find in the detailed view of an item such as this:



Inventory Fields Description

Note: The field names and the number of fields on this page might differ from yours depending wether or not your record center modified the default layout and names. If in doubt, please ask your record center.

Field Descriptions

Item Type
Read-only field indicating if the item is a box or a file.

Status
Read-only field that can take values "PRE ADD", "IN", "IN-HOUSE" "SELECTED", "OUT", "TO DESTROY", "DESTROYED", "TO TRANSFER", "TRANSFERRED", "TO DELETE", "DELETED". This field indicates the current state (activity can also be used) of a box or a file. This field is automatically updated to reflect the operations made on boxes or files.

RC (Record Center) Number
Read-only numeric field.
This field indicates the number (unique) automatically attributed to a box or a file. It is used internally by the system for tracking purposes.

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Old Number
Read-only alphanumeric field containing a maximum of 16 characters.
When a box or file number is modified, the old number will be displayed in this field for reference. If the number is changed a second time, then the original number will not be retrievable, at least for searches by old numbers. Effectively, all the old numbers of a document are saved in the document history.

Entry Date
Read-only field that indicates the date when a box or file was put to in PRE ADD. When the item is returned to the record center (status IN), the entry date changes to the date of the delivery on which it was returned.

Withdrawal Date
Read-only field that indicates the date when the box or file has been removed from the inventory (date at which the document became DELETED, DESTROYED or TRANSFERRED).

Number
Required (for boxes only) alphanumeric field containing a maximum of 20 alphanumeric characters.
This field contains the number assigned to the box or the file. The following values are all valid : 100, 100-01-01, TB-00002.

Description
Optional alphanumeric field containing a maximum of 40 characters.
This field contains the description of the item.

Department
Required drop-down alphanumeric field containing a maximum of 30 characters.
This field indicates to which department and sub-department a box or file belongs to. For example, CLAIMS/CLOSED CLAIMS indicates that the box is in the CLOSED CLAIMS sub-department of the CLAIMS department.

Note: If the conservation policy uses departmental retentions, the disposal dates will be determined from the retention associated with the sub-departments.

Owner
Optional alphanumeric field containing a maximum of 20 characters.
This field indicates to whom the box or the file belongs to and is strictly for internal use for the customer.

Start date / End date
Optional fields with a predefined date format that can be modified. These fields are used to specify the start and the end dates of a box or a file. These fields are useful when the content of a box or a file has a specific defined period. The disposal date will be calculated by adding the conservation period to the end date (when it is present).

Type
Required drop-down alphanumeric field containing a maximum of 10 characters.
This field describes the document type of the retention schedule by which the disposal date of a box or a file is controlled.

Source
Optional alphanumeric drop-down field containing a maximum of 10 characters (can be dissociated with the drop-down list for the File module).

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For boxes, this field indicates the location where the box came from before arriving at the off-site record center. For files, this field is reserved for the internal use of the customer and any information can be entered here.

Field 1 / Field 2 / Field 3
Optional alphanumeric fields containing a maximum of 20 characters each.

Access level
Numeric field containing a value between "0" and "9" inclusively.
The access level is used to prevent unauthorized users from editing or ordering boxes with access restriction ("9" is the most restrictive access). When editing the field, the user can only assign a value less than or equal to his own level. If the access level of a user is less than the box access level, the user is not allowed to edit or order it.

Disposal
There are three fields related to disposal :

A first choice field containing the values "CONFIDENTIAL", "NON-CONFIDENTIAL", "NONE", "PERMANENT", "REVISION", "SAMPLE" or "SEND TO DEPOT". This sub-field indicates the disposal mode used for the concerned document types.

A second sub-field indicating a disposal date. The box or file will be reviewed on the disposal date. If the disposal is set to "VARIABLE" in the next field, then the disposal date of a document corresponds to the conservation period added to the End Date (when present) or to the Entry Date.

A third choice field containing the values "FIXED" or "VARIABLE".
If "FIXED" is selected, the disposal date will not be controlled by the customer's conservation policy, but will be the one entered manually in the field. When this field is set to "VARIABLE", the revision date will be calculated from either the department's or the document type's retention, depending on the customer's conservation policy. By setting this field to "VARIABLE", any updates to a department or a document type's retention will automatically adjust the disposal date of all the related boxes and files.

Range
Interval of documents contained in a box or a file.

Location (Files Only)
Shows the location of the file. Location can either be a box or a shelf.

Volume
Read-Only field that indicates the volume of a box in cubic feet.

Vault
This value indicates if the box is stored in a vault.

Item Set
This field allows to associate an item to an item set. When one item associated to an item set is ordered, all the available items associated to that set are automatically ordered by the system. To associate an item to an item set, simply type the item set name or description.

It is possible to associate the files of a box to different sets, even if none of these sets is the same as the box set. When a file is ordered in a box and the box is not granted to the same set, only that file and the other files of the same set are added to the order. Nevertheless, when a box is ordered,

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all the files into that box are ordered indiscriminately.

Notes
Alphanumerical field used to add notes to an item (ex: fragile).

Keywords
Alphanumerical field used to add new keywords to an item. Keywords are very useful when using the Full Text Search choices (see Searching for a box or a file 21.)

History
Read-only field that indicates all the changes done to a document, as well as all its transfers (from IN to OUT, etc.)

Images (for Files only)
This sections allows you to view on screen the images contained in a file if any. This section also allows you to import and/or scan images directly into files. For more information on the imaging features of RCWeb please browse the "Imaging Options" 25 section of this manual.

Files (for boxes only)
This section shows the different files contained in the box.

Tape Schedule
This section shows the schedule for the next delivery dates of the item if any.

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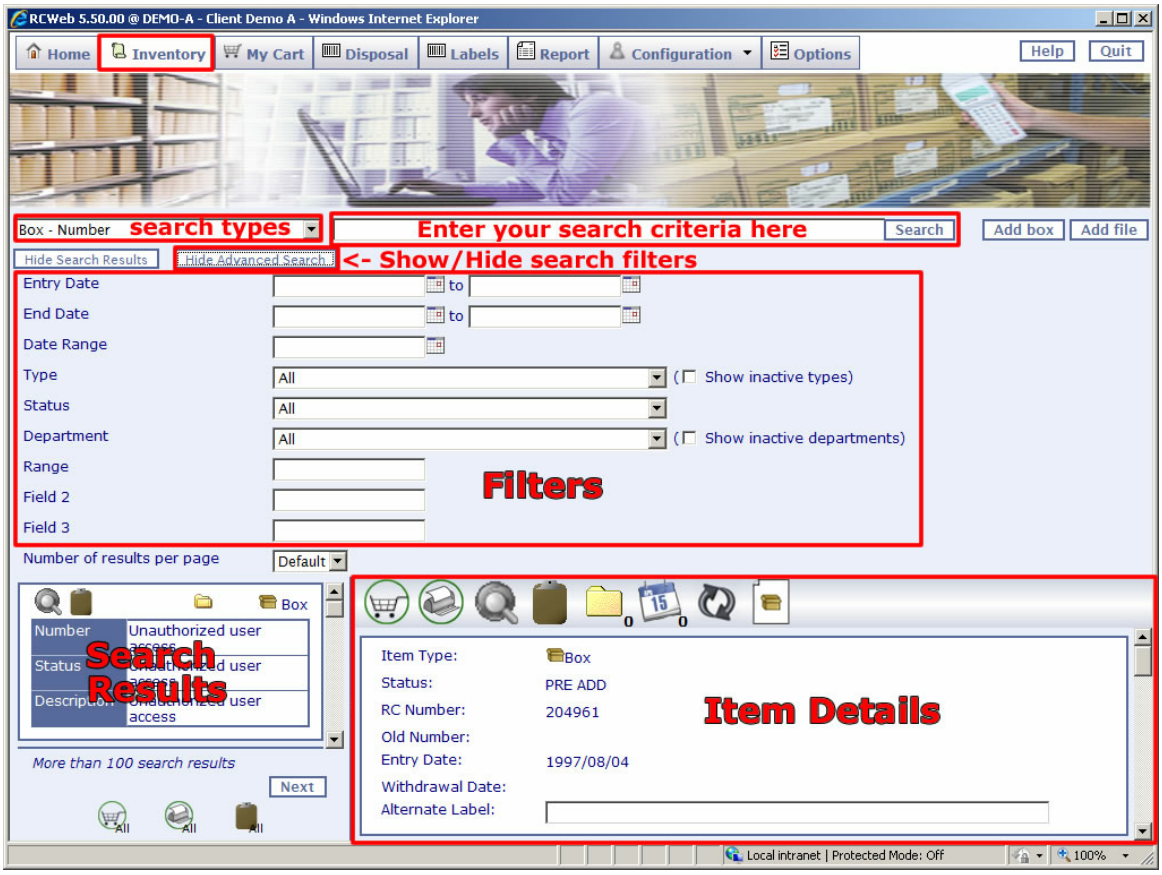
3.3 Searching and Viewing Information for a Box or a File

When you search for a box or a file, you have the choice (as seen in the screenshot below) to "show" or "hide" the search filters. Search filters give you the ability to narrow down your searches for more precision.



Searching for a box or a file

1. Select a search type in the drop down field at the left of the window (see screenshot above).

2. Enter your search criteria or keyword in the empty field next to it. Optionally you can also include additional filters from the filters section. Press *Enter* or click on the **Search** button to initiate your search.

3. The search results appear at the left of the window. By default, the first result in the list will be selected and you will see its details on the right side of the screen.

Performing a full text search

Note: when adding or editing information to a box or file, full text search for the new information won't be available until between 20 and 30 minutes after the edit is completed.

1. Select on of the three full text search types in the drop down field at the left of the window : **Full Text Search- Find all words | Full Text Search- Find any of these words | Full Text Search- Advanced Search**

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2. Enter your search criteria or keyword in the empty field next to it. Optionally you can also include additional filters from the filters section. Press *Enter* or click on the **Search** button to initiate your search.

3. The search results appear at the left of the window. By default, the first result in the list will be selected and you will see its details on the right side of the screen.

Note: With the "Advanced Search" option, the search engine lets you enter some "boolean expressions" and will find every item or document according to the expression chosen.

Legend:

A&B means "A and B"
A+B means "A or B"
!A means "not A" (opposite of A)
(A&!B)+C is a sub expression which means "(A and (not B)) plus C

Examples:

If you want to search for a certain box containing the words "fragile" and "document x" you would type the following expression : fragile&document&x or fragile&document x. Be careful not to leave any spaces between the different signs (+, !, &) and the words and do not put any periods at the end of expressions because it could modify the search results.

If you want to search for a box containing the word "document" but not the word "fragile" you would type the following expression: document&!fragile.

If you want to search for a box containing the word "document" and the word "company" but not the word "fragile" you would type the following expression: !fragile&document&company. Note that the order in which the words are placed doesn't matter and so document&company&!fragile would give the same results.

If you want to search for a box containing the word "document" or the word "company" but not the word "fragile" you would type the following expression: (document+company)&!fragile.

Note: The searches are not case sensitive if cases are not mixed in the same word but do become case sensitive if mixed. So for example if you search for documents that have the word "montreal" in them, these 2 will work:

MONTREAL, montreal

but not:

Montreal

and since in most EDC fields the case are always uppercase, then you should not mix cases when performing a search. By default we always simply do our searches in lower case.

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3.4 Editing Box or File Information

1. Search 21 for an item to edit.

2. Enter the new information in the required fields (the compulsory fields are in red).

3. Click on the **Update** button at the bottom of the window.

Note: As soon as you change the value of one of the fields, a yellow warning circle will appear on the top right corner of the detailed view of the item to let you know that some modifications have occurred but have not been saved yet. It is therefore important that you press the "update" button at the bottom of the window to save your changes before you move on to another page or do another search otherwise your changes won't be saved. The warning looks like this:

To add | edit notes or keywords

4. Click on the (+) sign besides **Notes | Keywords**
5. A window appears below the title of the field.
6. Add or edit notes | keywords.
7. Click on the **Update** button at the bottom of the window.

Note: Keywords are particularly useful when using the Full Text Search options of the *Inventory* module (see Searching for a box or a file 21.)

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3.5 Adding or Deleting a Box or File

Adding a box or file

1. Click on the **Inventory** tab.

2. Click on the **Add box or Add File** button.

3. A new window appears.

4. Enter the different information of your new box or file (the fields in red are compulsory).

5. Check the *Add to print list* check box if you want to print the item's label.

6. To simply view the item you just added select the "*Display the created item"* option in the drop-down list. To create another item after that select the *"Create another item"* option in the drop-down list.

7. When all the information has been entered click on the **Add** button at the bottom of the window.

Deleting a box or file

1. Search for a box or file to delete.

2. Click on the **Delete** button at the bottom of the window.

Note: The box or file must be in the PRE ADD state in order to be deleted.

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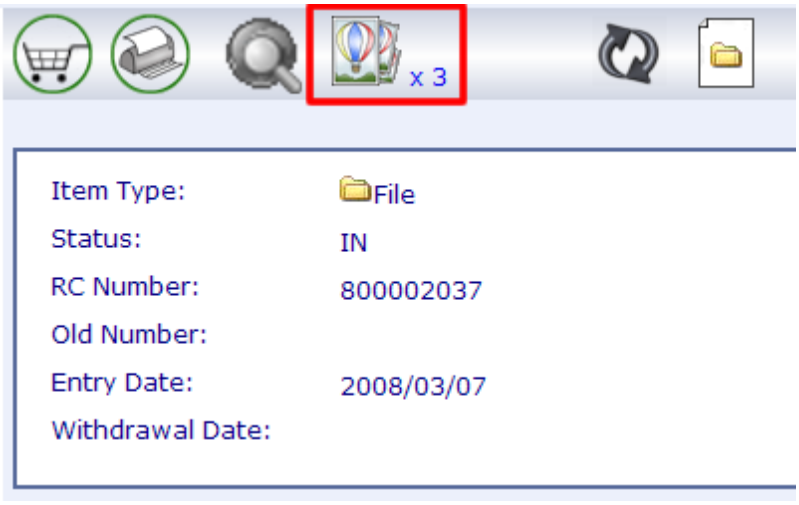
3.6 Imaging Options

3.6.1 Viewing Images in a File

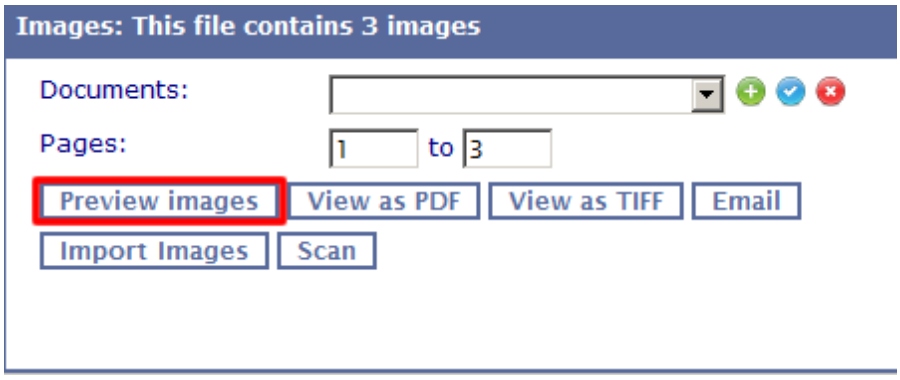
1. Search [21] for a file

2. Click on the **Images** icon from the tool bar:



Note: The number beside the icon defines the amount of images in the folder.

3. This will bring you down the page to the images section:



4. Enter an interval of images in the fields and click on the **Preview images** button:

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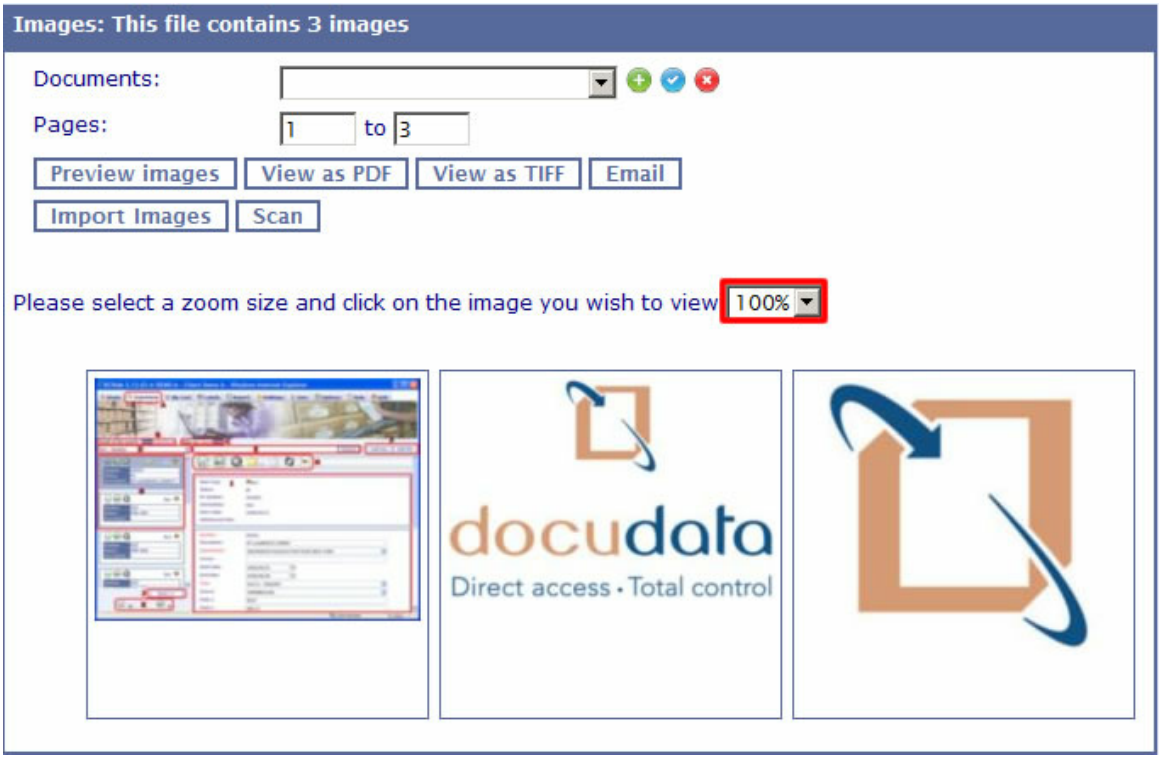

5. Select a zoom value and click on an image to view it. It will appear in a new window. You can also view these as PDF or TIFF format by pressing the appropriate button.

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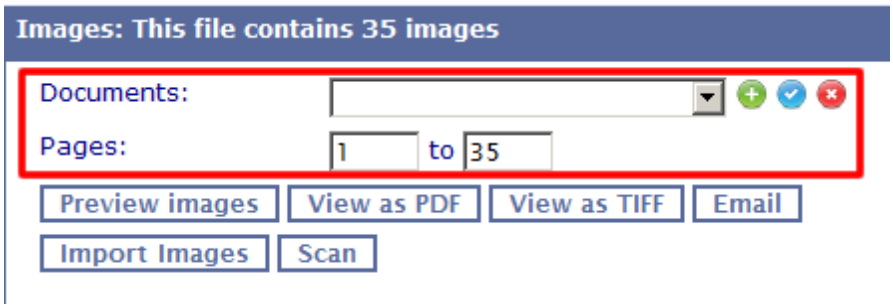
3.6.2 Indexing Multi-Page Images

Multi-Page images can now be indexed as documents for easier searching and sorting.



For example as in the picture above, let's say that my current file contains 35 images, or 35 "pages" of image. I can now "index" groups of pages together using the following buttons:

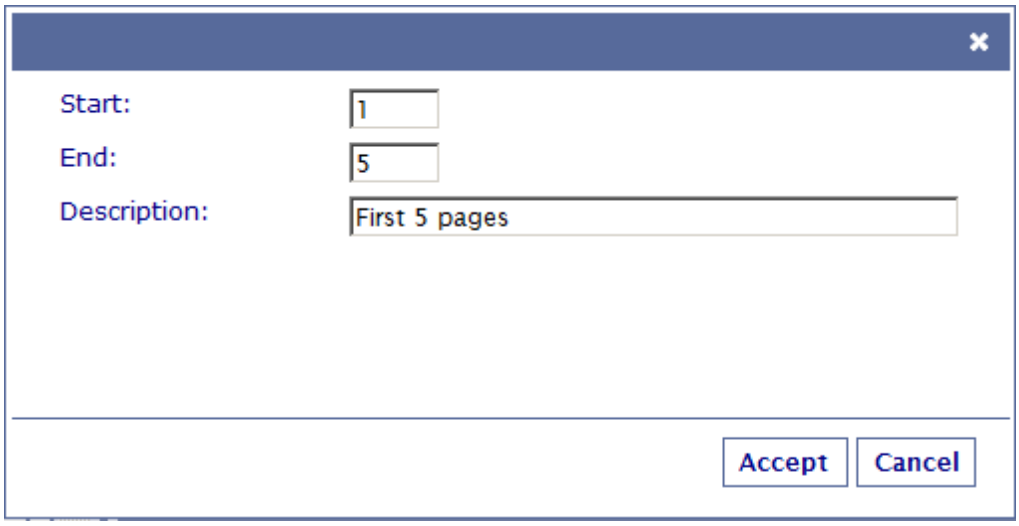
Used to ADD an index.

Used to EDIT an existing index.

Used to DELETE an existing index.

Let's index the first 5 pages as an example:

1- Click on the green button to start a new index. A dialog appears:



All you have to do is enter the start and end page to be indexed and a description for the index. When you are done you simply click on the "Accept" button to complete the procedure.

2- Once you click the "Accept" button, this new index will be automatically chosen in the "Documents" drop-down menu as shown below:

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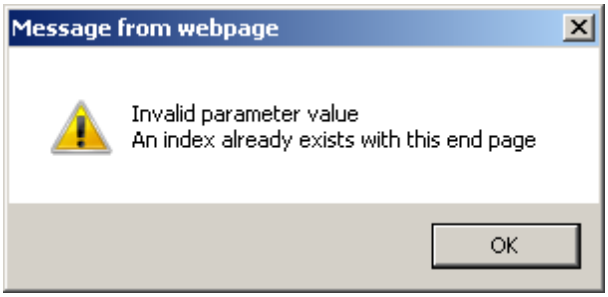
From here you can "edit" this same index if you wish by clicking the blue "edit" button or delete it with the red "delete" button. Once you are done with your index then you can create more until you are happy with the results.

Note that you cannot have 2 indexes with the same "end" page. If you try to add a new index and choose the same "end" page as one that already exist you will get an error like so:



These indexes can be used also later on when doing a full text search to quickly find images. **Note that this feature is not yet automated from the web directly. If you need to have image indexes available through the full text search facility, you need to tell your Record Center to index those documents for you.**

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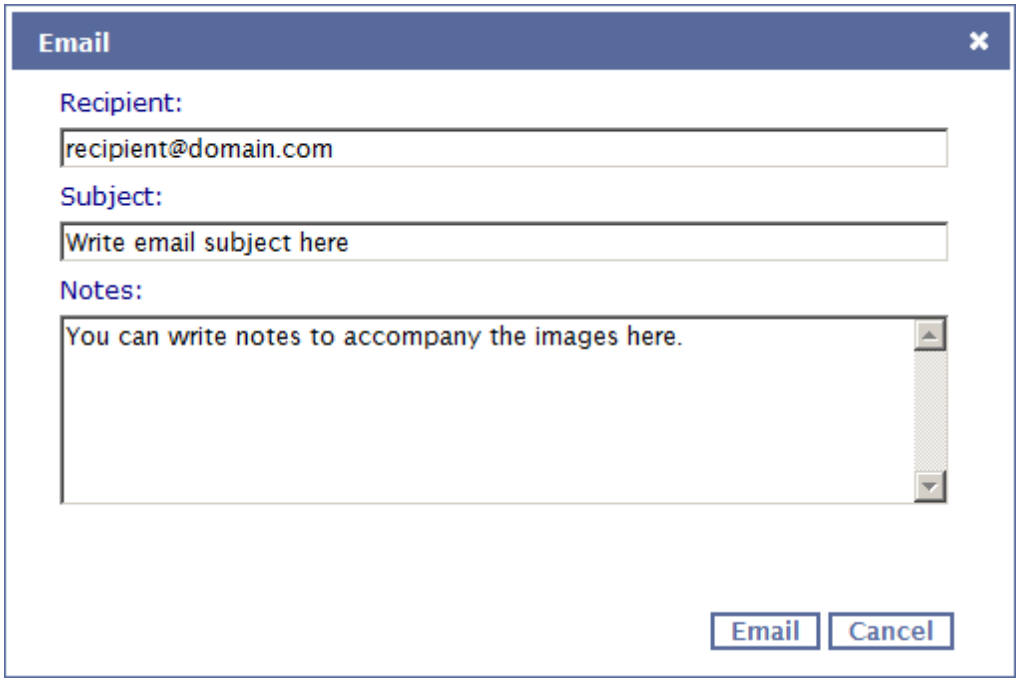
3.6.3 Emailing Images

Images can also be emailed to any valid email address. You first select the range of pages that you want emailed and then you click on the "Email" button as indicated in the picture below:

Then a new window will pop-up on top where you can enter the recipient's email addresses, the subject of email and any notes you wish to attach to the email:



When you are ready to send the email you simply click on the "Email" button.

Note: If you need to send the email to more than one recipient, simply separate the email addresses with a comma like so:

recipient1@domain.com, recipient2@domain.com etc...

Note: The limit of recipients you can send the email to is not defined by RCWeb but by your internet provider.

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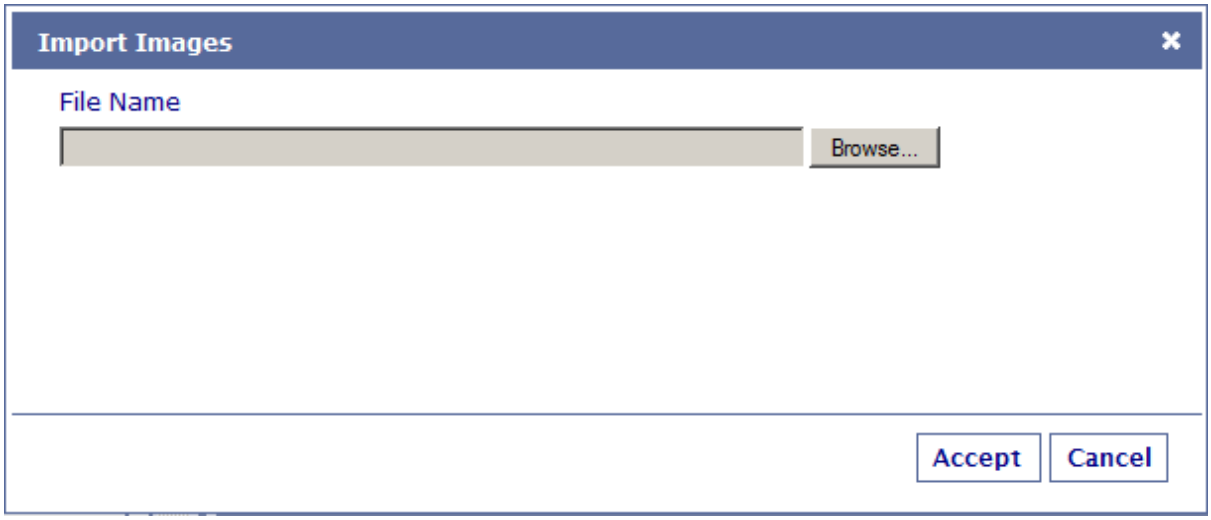
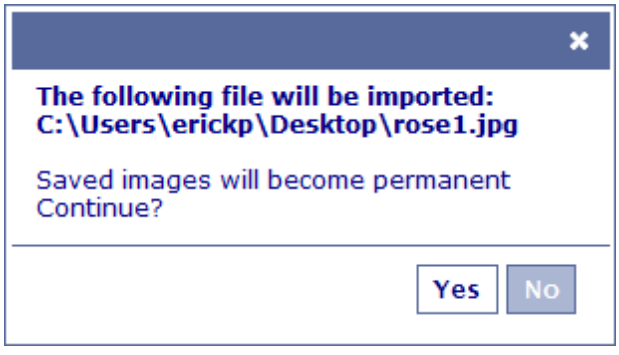
3.6.4 Importing Images Into Files

You can import images (1 at a time) into files by first clicking on the "Import Images" button like shown below:

The "Import Images" dialog will then open so you can choose an image from your computer. Just click on the "Browse" button in the dialog to choose an image from your computer and then click the "Accept" button when ready.



After clicking on "Accept", you will also get a confirmation dialog like so:



Note: This dialog is an important part of the import process because once an image is imported it cannot be deleted unless the whole file is destroyed on a disposal list.

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After clicking "Yes" on this dialog, the image will be appended to the end of the image list. So for example if you had 35 images in before importing a new one, the newly imported image will be located at # 36.

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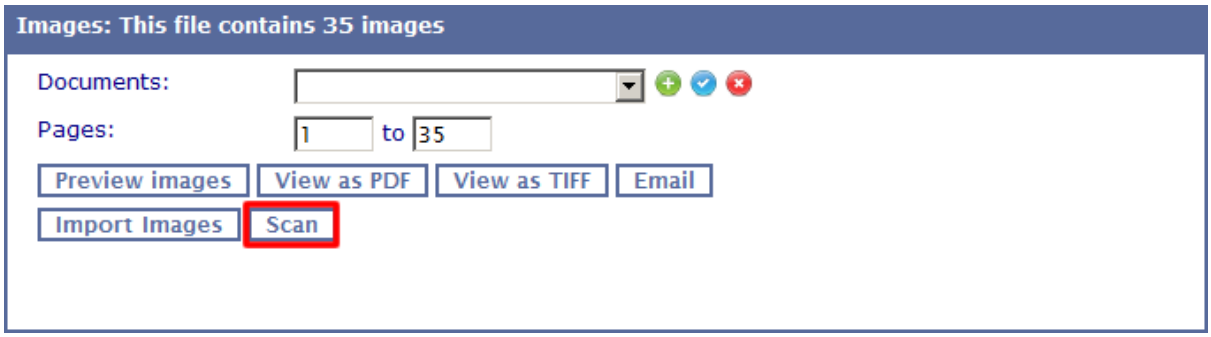
3.6.5 Scanning Images Into Files

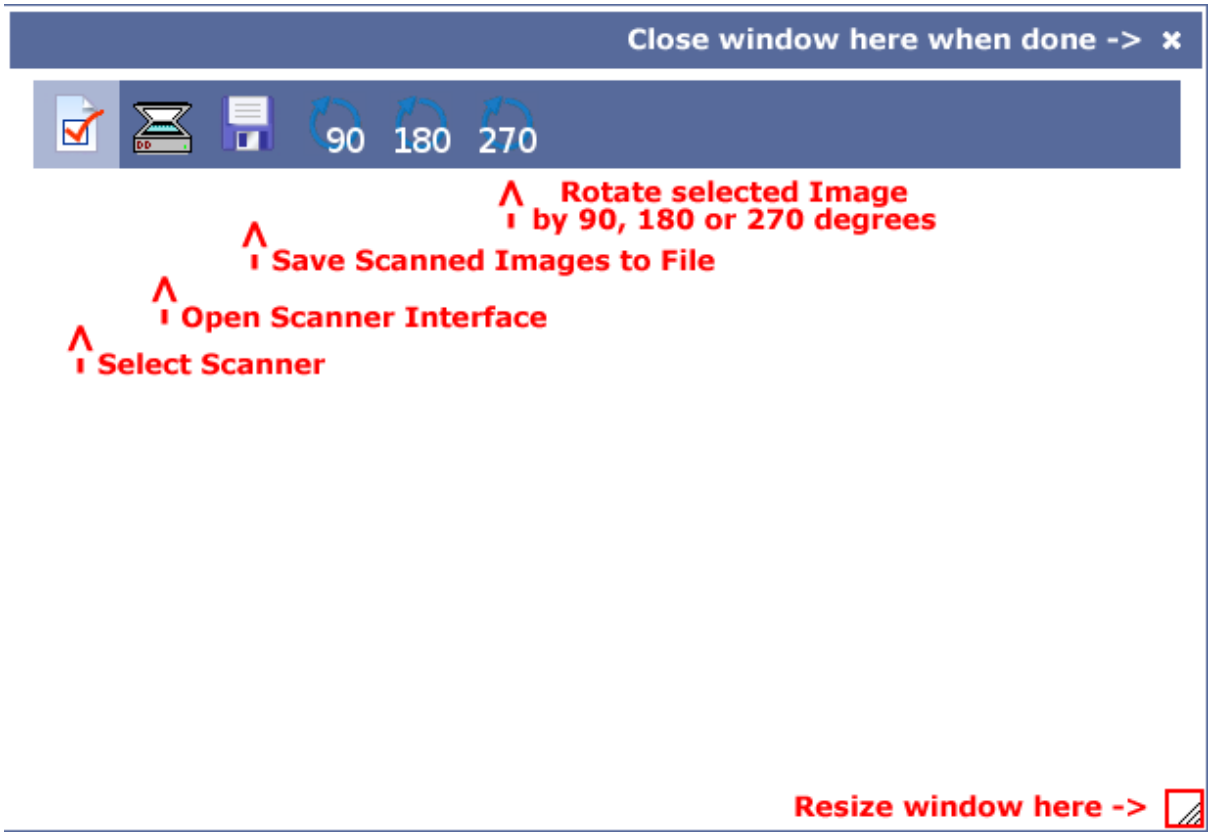
If you have a TWAIN-compatible scanner setup on your computer, you can scan images directly into files via RCWeb.

Note: You need to have the "Java Runtime Environment" (JRE) installed on your local computer in order to use the image scanning feature of RCWeb. The **minimum version required is "JRE 6 Update 10"** although at the time of writing this manual, they were already at version "JRE 6 Update 13". Go to "http://java.sun.com" to download the package or click here to access the download page directly.

To start you first have to click on the "Scan" button as seen in the picture below:



Then the scan window appears like so:



The first thing you should do here is to make sure you have your scanner selected and ready for

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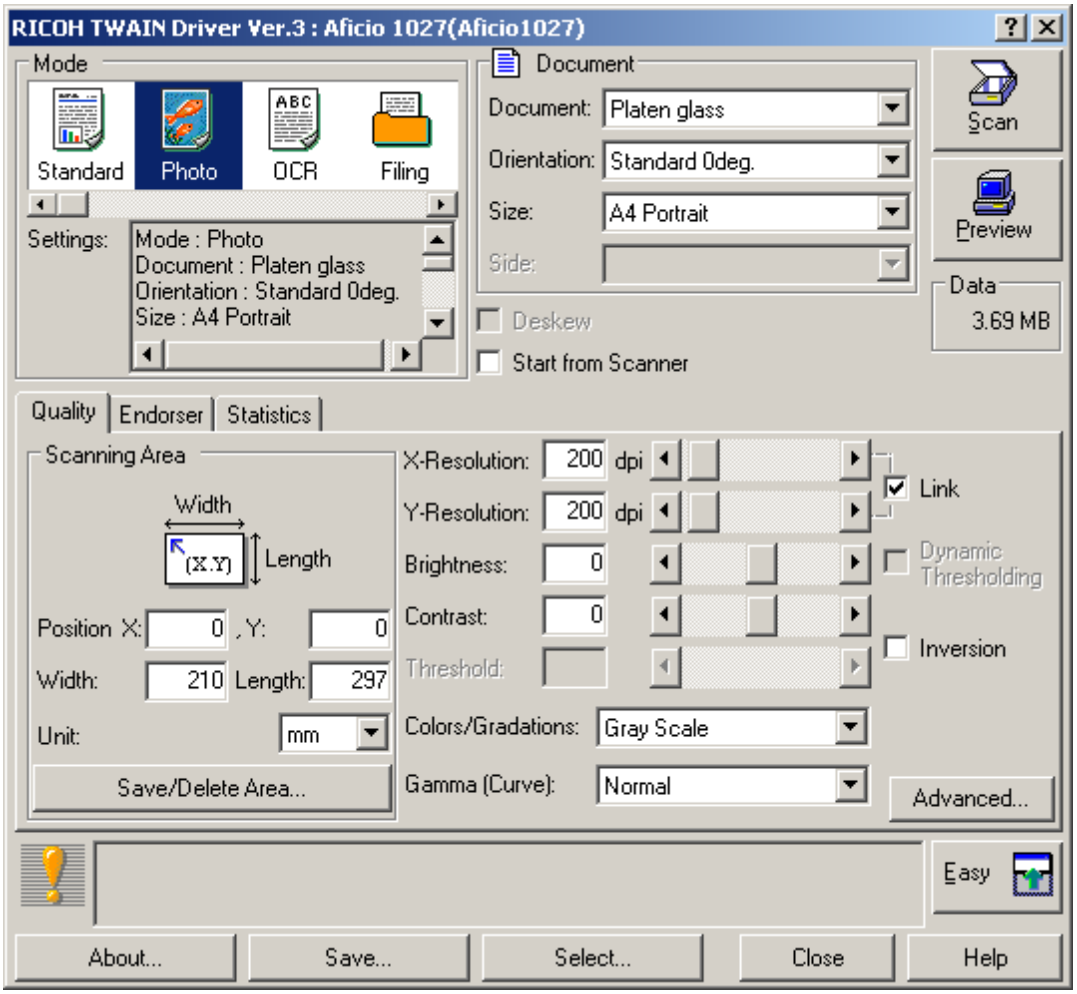
scanning. As seen in the picture above you have to click this button to choose your scanner. If you don't see your scanner in this list please ask your computer administrator to make sure it is properly installed. **Note that if your scanner does not have a compatible TWAIN driver installed, the scanning won't work.**

Once your scanner is chosen open your scanner's interface by clicking on this button . Here's what I got when opening mine:



Note that every scanner will have its own variant and might not look at all like the one you see here.

Note also that the scanner's interface might appear to not show up at all. It might just be that it is hidden behind another window so if you don't see your scanner's interface the first thing you should do is move or resize the other windows on your screen to make sure it is not hidden.

Once you're happy with the scan settings you can start scanning your images by pressing the appropriate button on your scanner's interface. In the example here, I have to push the "Scan" button on the top right of the picture above.

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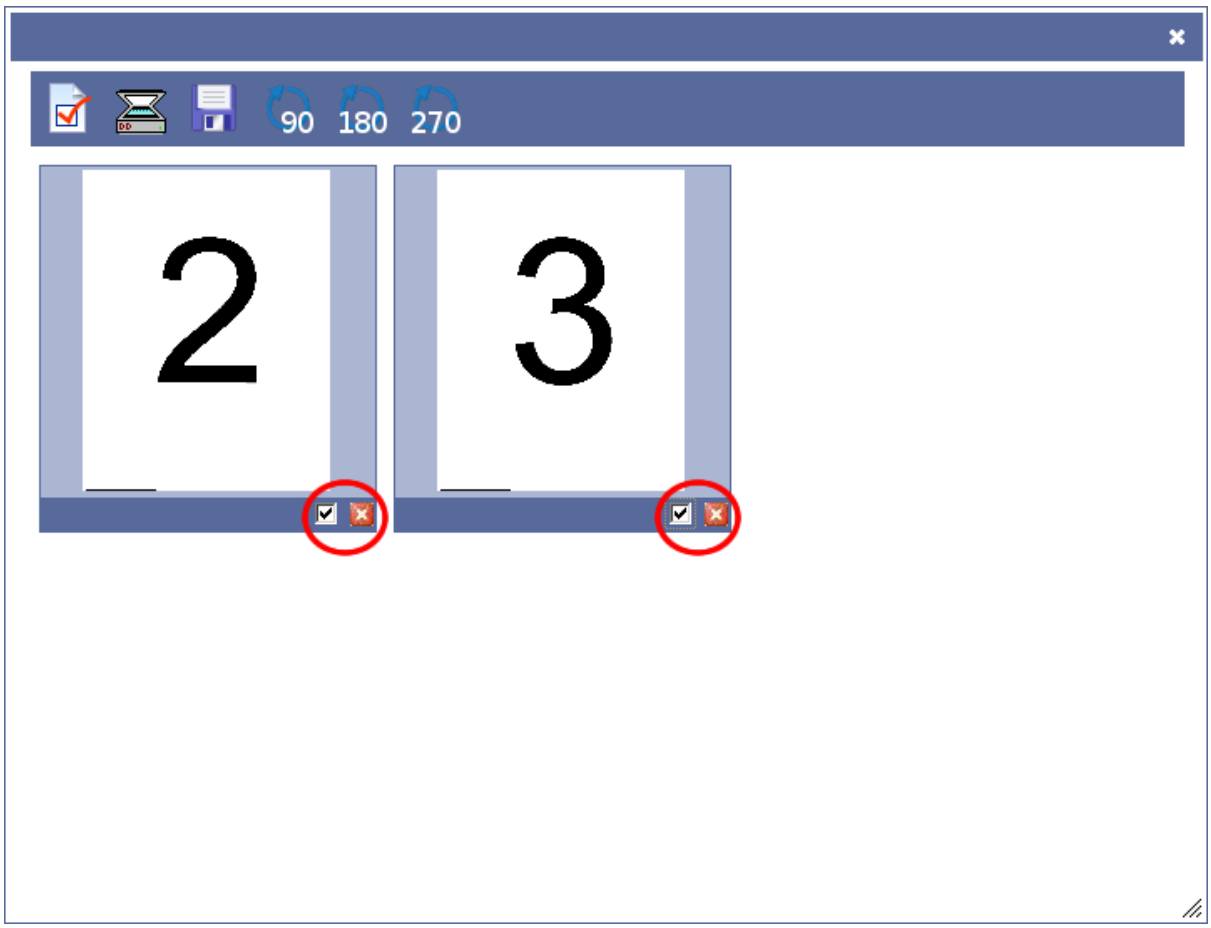
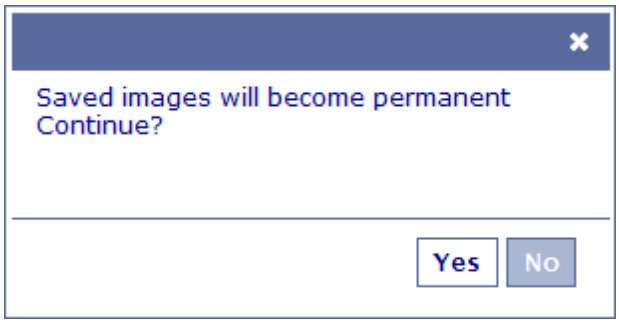
Once the scanning is done you should return to the scanning window of RCWeb where you will see your scanned images like so:



At this point you can select (see the checkboxes in the picture above) any image from the list of shown images and rotate them if you need to with 90, 180 and/or 270 rotation buttons and/or simply save them to the file. When you click on the save button you will be asked for a confirmation like so before continuing:



Note: This dialog is an important part of the import process because once an image is imported it cannot be deleted unless the whole file is destroyed on a disposal list.

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After clicking "Yes" on this dialog, the image will be appended to the end of the image list. So for example if you had 35 images in before scanning these 2 images, the newly imported images will be located at # 36 and # 37.

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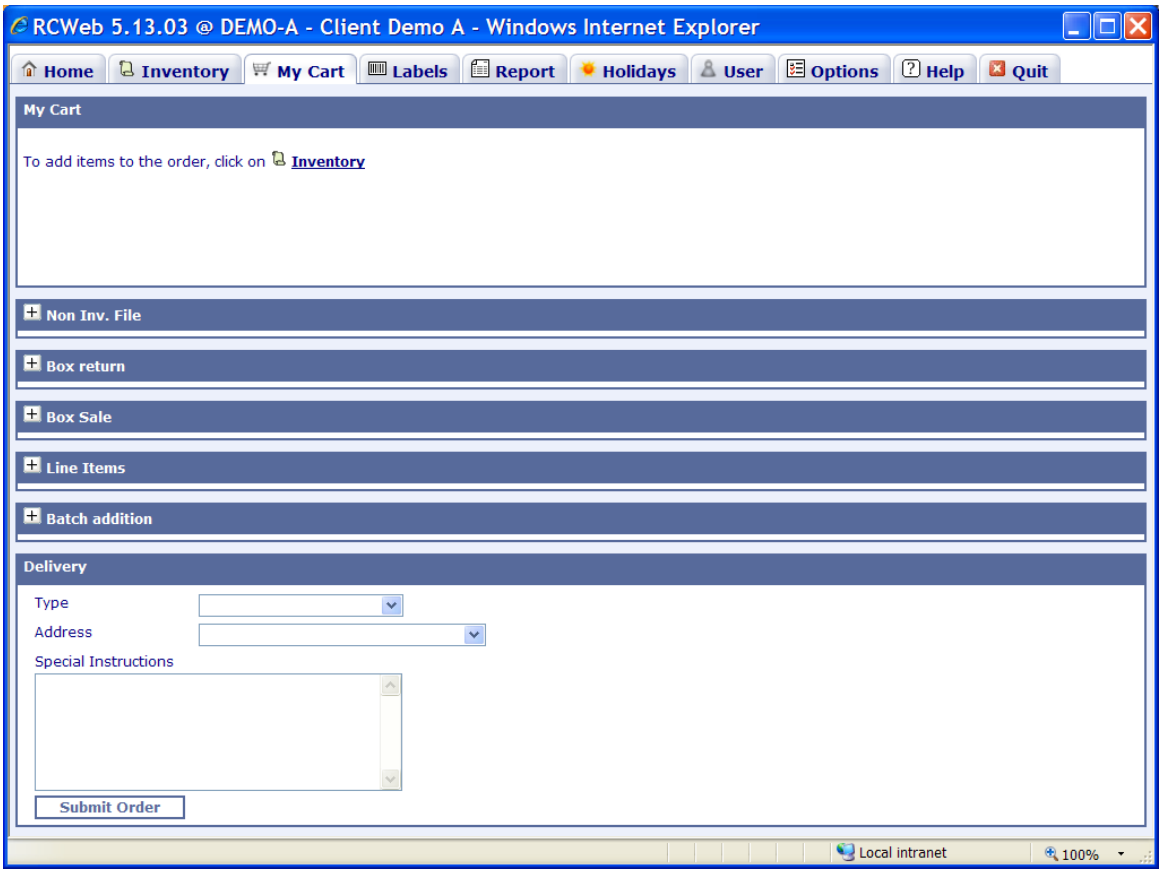
4 My Cart tab

4.1 My Cart Tab Layout

When you first open the "My Cart" tab, you are presented a screen like so (if you have not added anything to your cart yet):



Here's the description of the different areas in this page:

My Cart

This is the area of the page where items you add to your cart will appear. From this area you can delete items from your cart and/or specify extra information like the "recipient", the "return" or "permanently out" status to your order items. Here is a picture to illustrate:

Non Inv. File (Open-Shelf files only)

The non-inventoried file section is where you add a previously non-inventoried open-shelf file directly to the order, inventorying it at the same time. It is assumed that you know personally that the file

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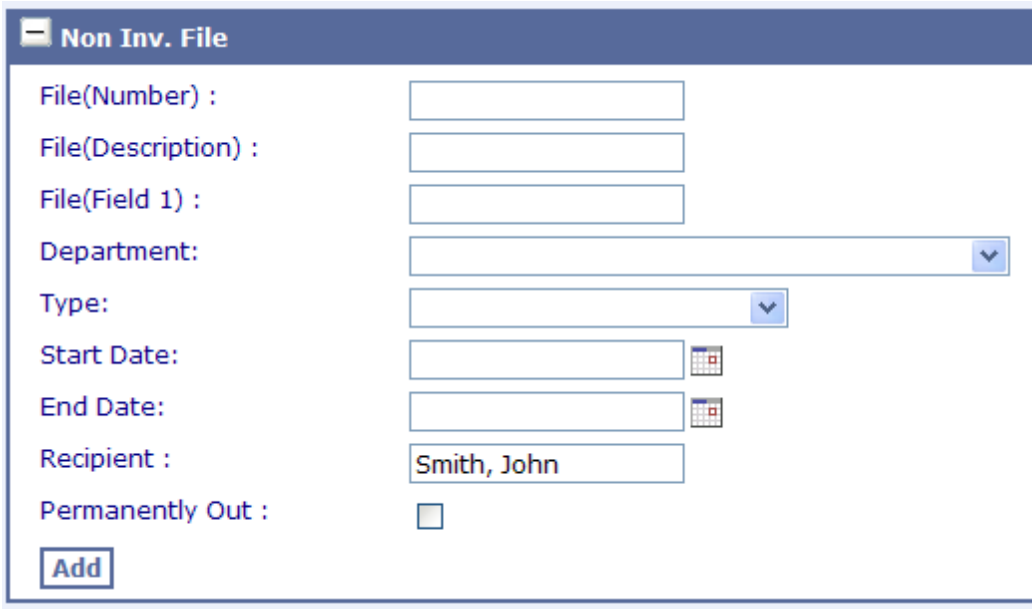
really exists. When the order is processed at the record center, if the file cannot be found it will simply be removed from inventory.



Box return

You use this section if you want the record center to come and pick up a number of boxes for you. This is the simplest way to return boxes to the record center. It is assumed that the boxes are either already inventoried or that the record center does the data entry for you on arrival.

Box Sale

If you need more empty cardboard boxes to put your files in this is where you order them from. Simply enter the quantity and to which department they belong to.

Line Items

The line items section is where the record center offers different items and/or services than just box

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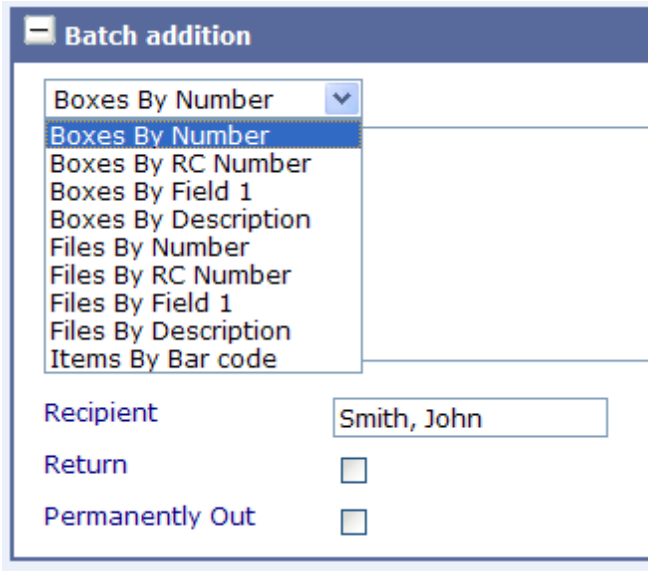
and file retrievals. Most likely these items/services will be listed in here.

Batch Addition

The batch addition section is where you can add many boxes and/or files on the order at once. So whatever criteria you choose to use make a batch addition, all you have to do is make sure there is put one criteria per line. In the case of numbers for example, you would just enter one number per line as in:

1
2
3
etc…



Delivery

Here is where you choose which delivery type to use for your order and the address at which you want those items delivered. You can enter some special instructions to your record center there also if you need to.

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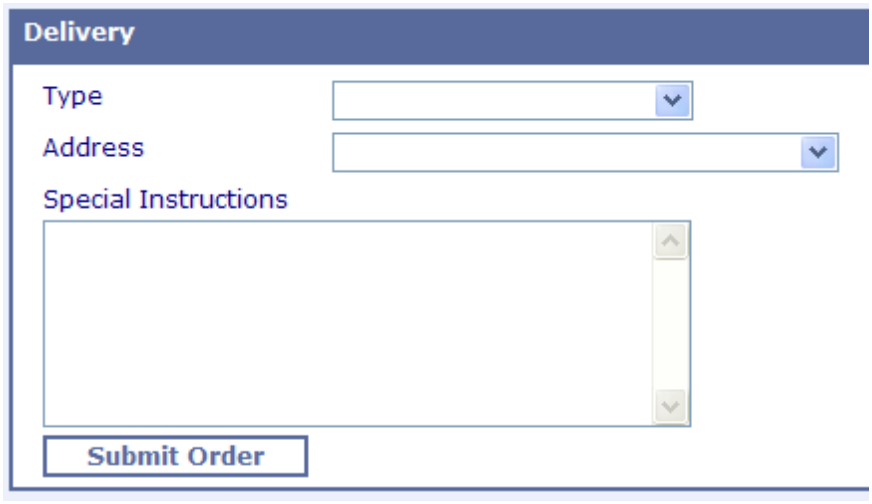

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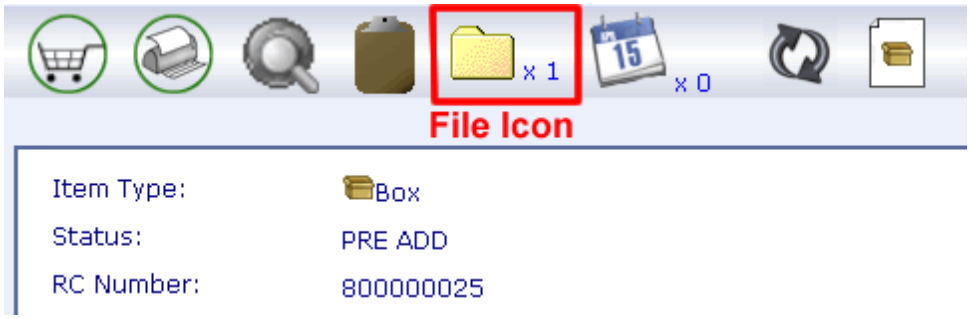
4.2 Placing an Order to Your Record Center

Placing an order to your record center is quite easy but depending on what you want to order or return there is a few different ways to accomplish this task.

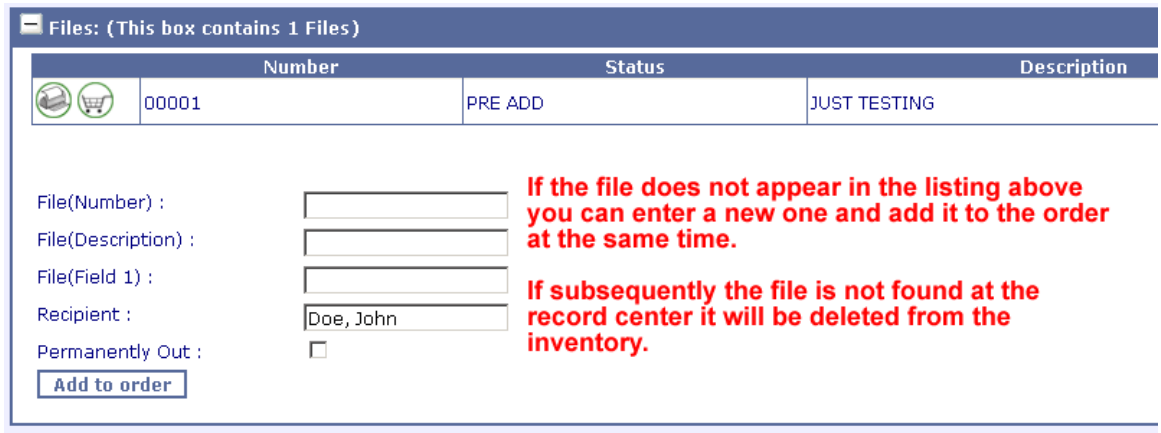
Scenario 1: Order from searches

One common way to place items on an order is to first "search" for the item you need and then place it on the order. To place it to the order simply press the little shopping cart icon at the top of your item's detailed view. The icon will pass from this to this when added.

If you want to order a non-inventoried file from a box, you first "search" for the box itself and then click on the "file" icon in the box module like so:



When you click on the file icon, the screen will move to the file section of the box like so:


Files: (This box contains 1 Files)
Number
Status
Description
00001
PRE ADD
JUST TESTING
File(Number) :
File(Description) :
File(Field 1) :
Recipient :
Doe, John
Permanently Out :
Add to order
If the file does not appear in the listing above you can enter a new one and add it to the order at the same time.
If subsequently the file is not found at the record center it will be deleted from the inventory.

Here as the image states, you first need to make sure that the file is not already listed in the box. If it is then you add it to the order by pressing the shopping cart icon . If the file is not in the list then you simply add it to the box and order at the same time by filing the necessary fields to identify it and click the "add to order" button to add it to your cart.

You repeat the same steps to keep adding items to your "cart". Once you are done adding items you can browse to the "My Cart" tab where you will find one line on your cart for each item that you placed. The line will look similar to this:

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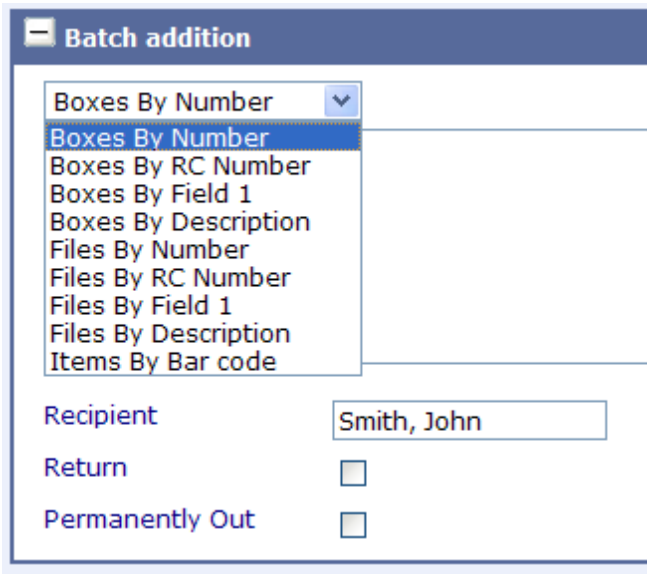
From here you can fine tune some of the parameters like the recipient, wether the item is to be returned to the record center or if you plan to keep it at your location indefinitely after delivery (permanently out). To delete an item from your cart simply press the red "X" on the left side of the cart.

Once you are satisfied with the items on your order you can specify your delivery options and submit your order 44 to your record center.

Scenario 2: Order via a batch addition

Another quick way to place an order could be in the case where you already know either the Number, RC Number, Barcode, Description or any other field indicated in the drop-down menu like in the picture below.



Then all you have to do is list the numbers (or any other fields info) on a line of its own in the area under the drop-down. Here also you can choose the standard options: recipient, return & Permanently out if you wish.

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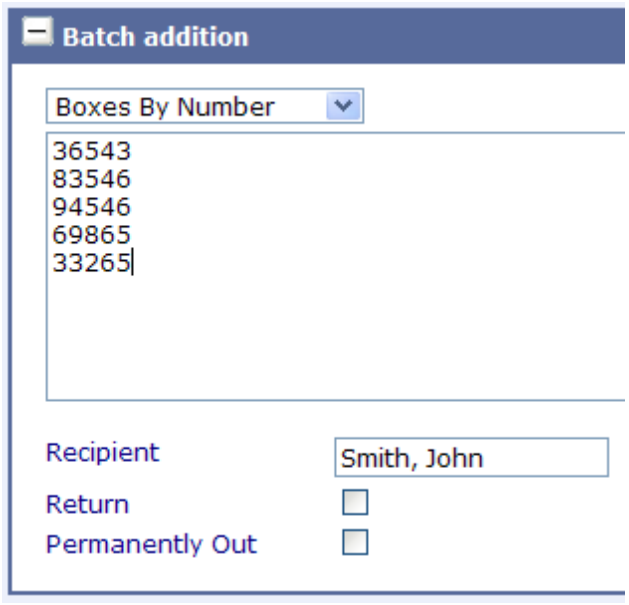
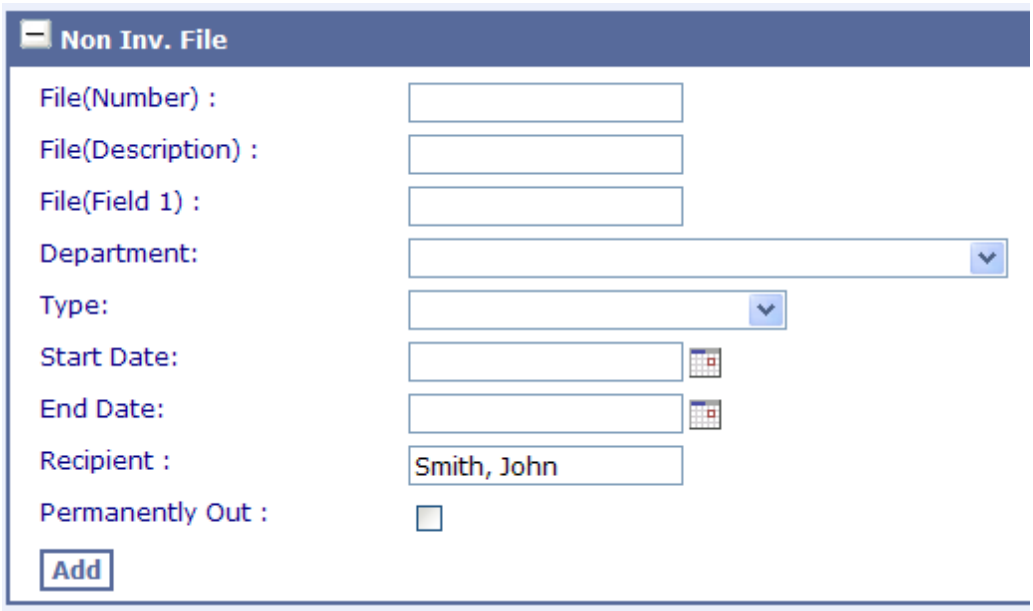


Once you are satisfied with the items on your order you can specify your delivery options and submit your order 44 to your record center.

Scenario 3: Ordering non-inventoried files (open-shelf files only)

Use this section if you want to add an open-shelf file to your order which is not inventoried into the system yet. It is assumed that you know personally that the file really exists. When the order is processed at the record center, if the file cannot be found it will simply be removed from inventory.



Once you are satisfied with the items on your order you can specify your delivery options and submit your order 44 to your record center.

Scenario 4: Ordering Imaged documents (Imaging on demand)

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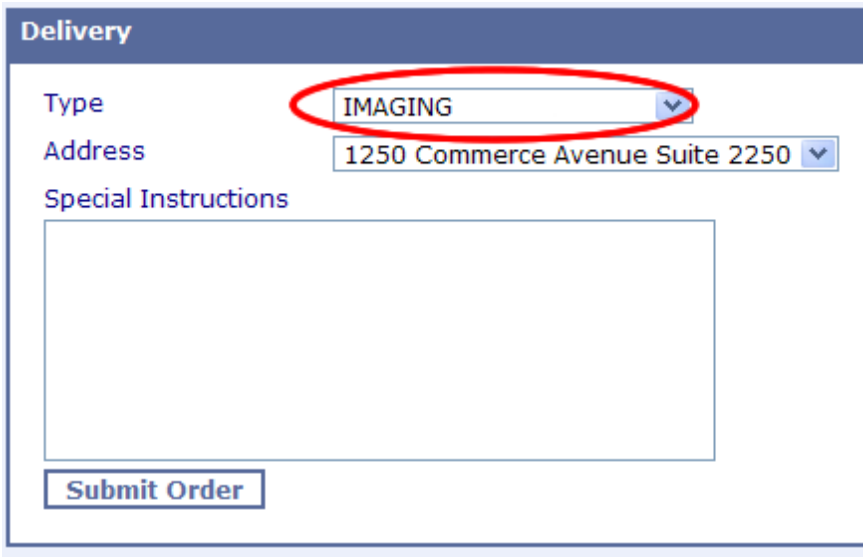
You can request files to be imaged by your record center for later viewing in RCWeb. Here's how you proceed:

1- Search 21 for the files to be imaged or add them directly to your order if know what they are.

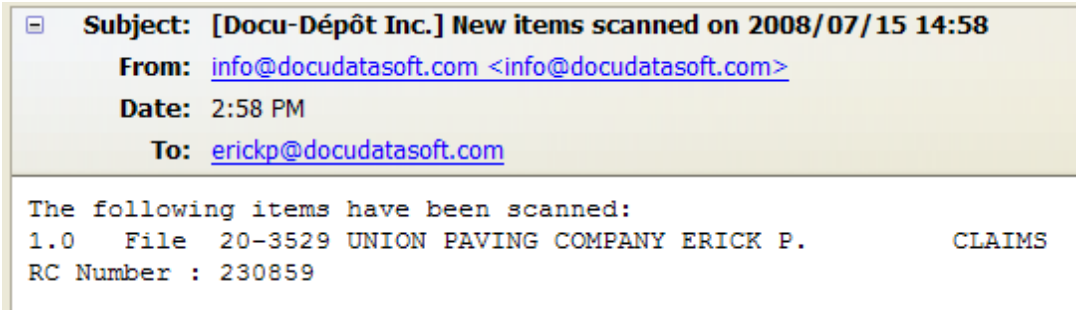
2- On the "MyCart" page, in the delivery section, make sure you choose a delivery type that relates to "imaging" as in the picture below:



Note: Your particular imaging delivery types might be called something different than what is mentioned here. You might not have access to any at all as well. If in doubt ask your record center.

3- When you're ready just click on the "Submit Order" button to send your order.

4- When your record center is finished processing the order, you will receive an email (similar to the one below) indicating that your file is now available in RCWeb and will tell you with which RC number to find it.


Subject: [Docu-Dépôt Inc.] New items scanned on 2008/07/15 14:58
From: info@docudatasoft.com <info@docudatasoft.com>
Date: 2:58 PM
To: erickp@docudatasoft.com
The following items have been scanned:
1.0 File 20-3529 UNION PAVING COMPANY ERICK P. CLAIMS
RC Number : 230859

5- You can go then into RCWeb and look 25 at the image(s).

Scenario 5: Ordering other items & services

Sometimes your record center will offer special services or other items other than your regular boxes and files. These can be ordered from this section. The "Line Items" drop-down menu lists all the

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available items and services available to you.

To add an item/service you simply choose it from the drop-down menu, select a quantity and department and press the "Add Line Items" button like in the picture below:

Once you are satisfied with the items on your order you can specify your delivery options and submit your order 44 to your record center.

Scenario 6: Returning new boxes to the record center

You use this section if you want the record center to come and pick up a number of boxes for you. This is the simplest way to return boxes to the record center. It is assumed that the boxes are either already inventoried or that the record center does the data entry for you on arrival. In either case, the boxes should already have a bar coded label on them. You obtain these labels from your record center ahead of time.

Once you are satisfied with the items on your order you can specify your delivery options and submit your order 44 to your record center.

Specifying delivery parameters and submitting your order

Before you can submit your order to the record center you have to specify the "delivery type" and select at which address you want your order shipped. If you need to enter any special instructions to the record center to accompany your order you can do so in the box provided:

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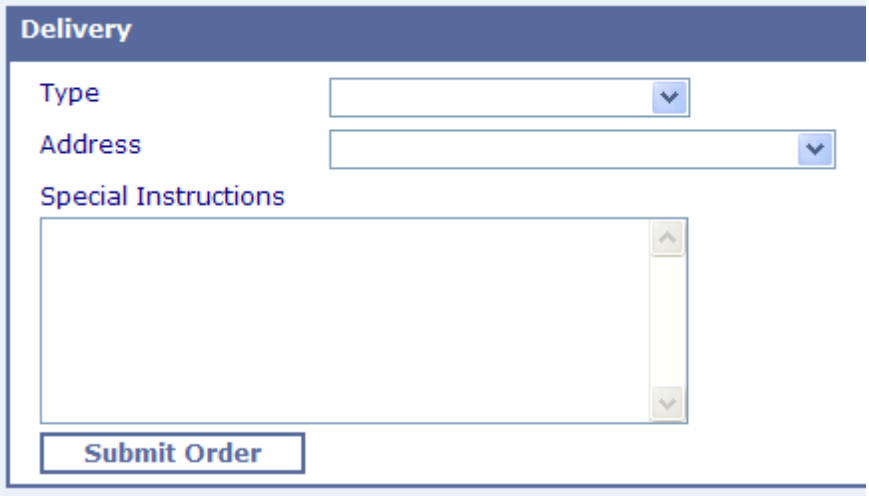
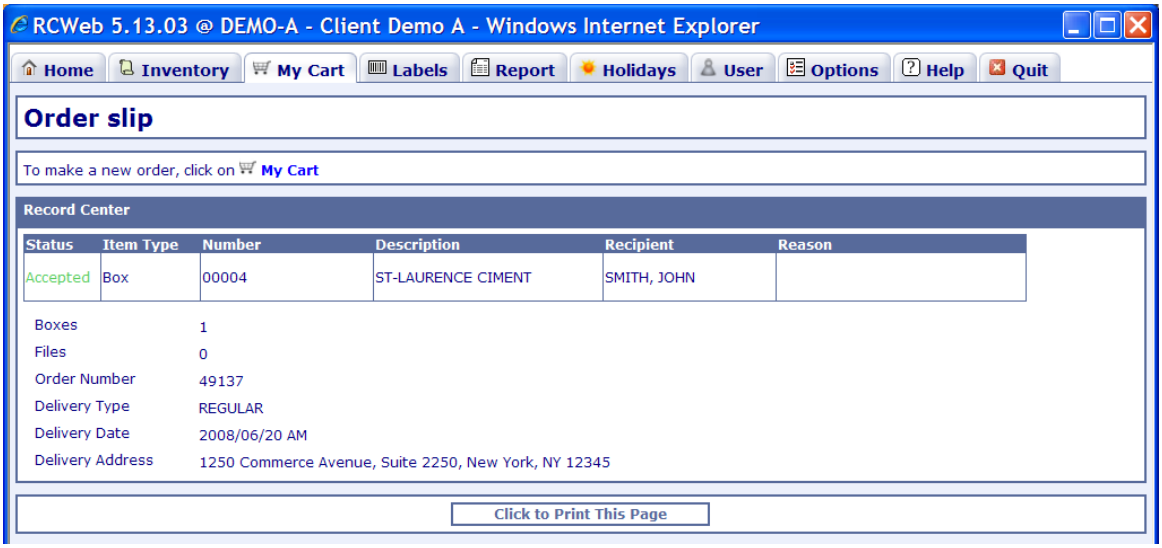


Once you have chosen your delivery parameters you can click the "Submit Order" button to place your order with your record center. Once the order is placed successfully you will presented an "order slip" similar to the one below which you can choose to print if you want to.



That concludes the section placing orders.

If you have scenarios of your own that this manual doesn't cater to, please contact your record center for additional information.

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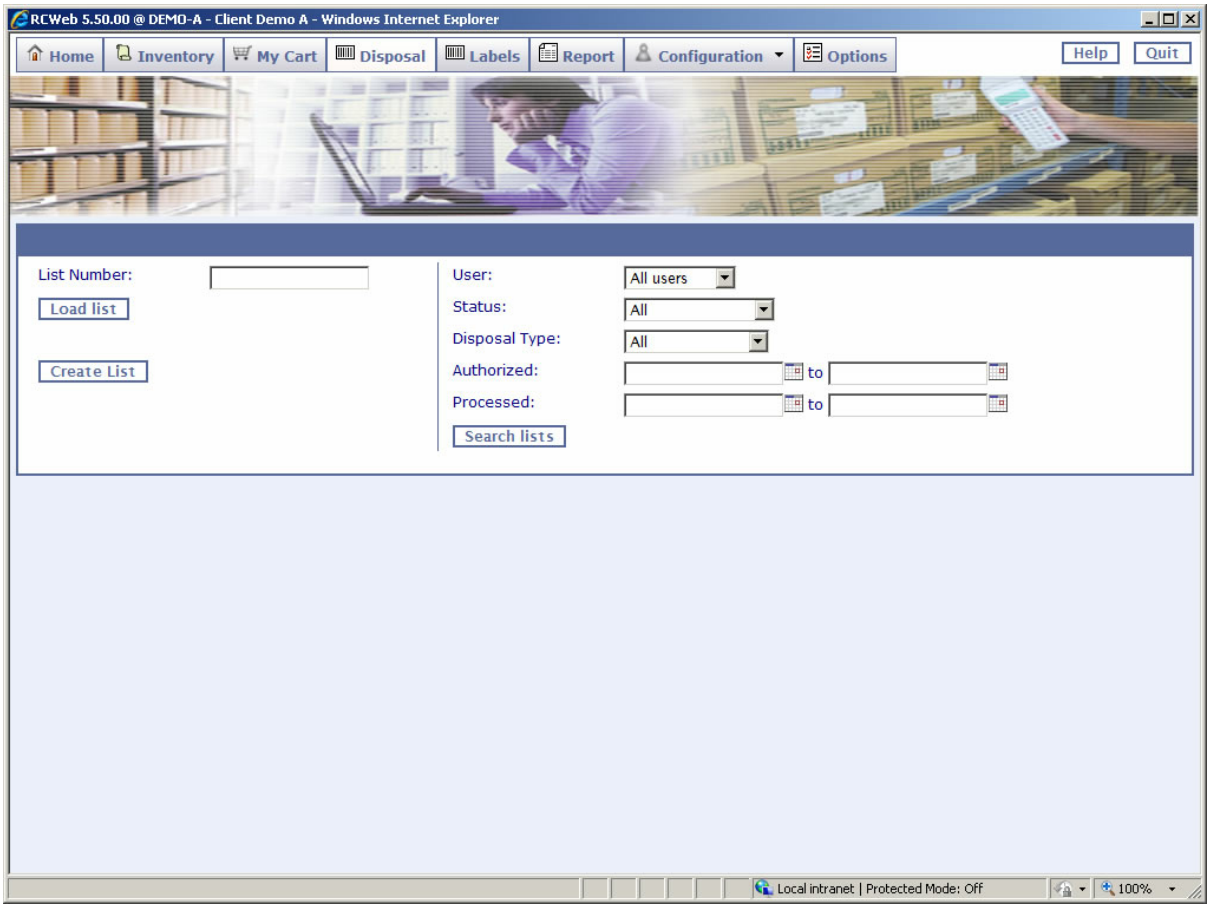
5 Disposal Tab

5.1 Disposal Tab Layout

You can now manage disposal lists in RCWeb. Here's what you first see when you enter the "Disposal" tab in RCWeb:



Here you can load or search existing lists and create new lists from scratch. The following pages will show you how to effectively use the disposal module in RCWeb.

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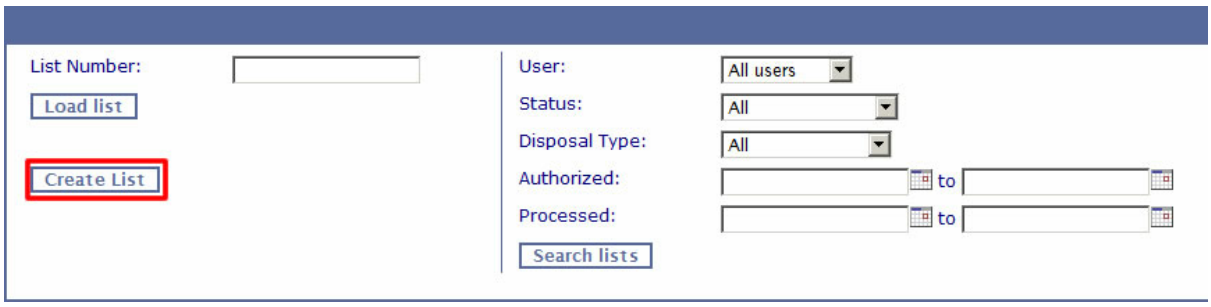
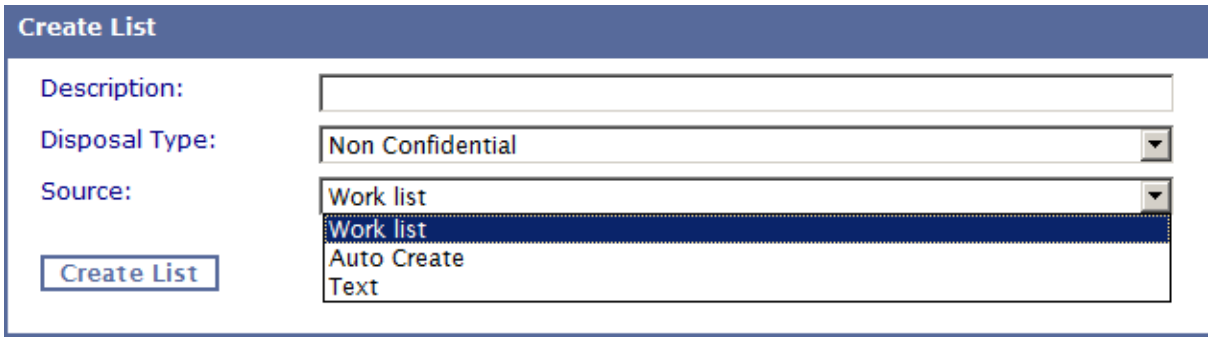
5.2 Creating a New Disposal List

To create a new disposal list you first have to click on the "Create List" button as seen below:

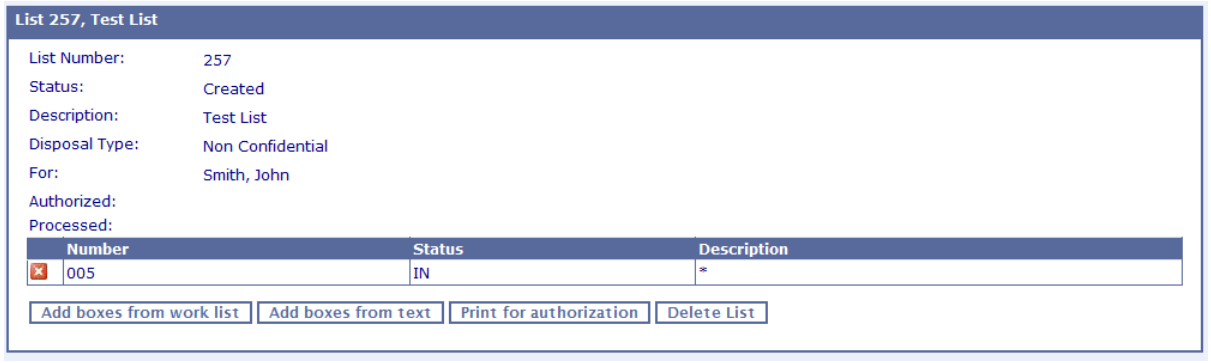


The window then expands to show you the list creation form like so:



As you can see from the picture above, you can create your disposal lists from 3 different sources (Work List, Auto Create & Text).

If you choose to create via the work list then you got nothing else special to do apart from entering a description for the list and choosing which disposal type you want the record center to use when processing the disposal. When you are done you simply click on "Create List" button to create the list. The list will then appear on the screen like so:



If you choose to create the list via the "text" source then you will have to choose by which kind of text field you wish to populate the list as seen in the picture below:

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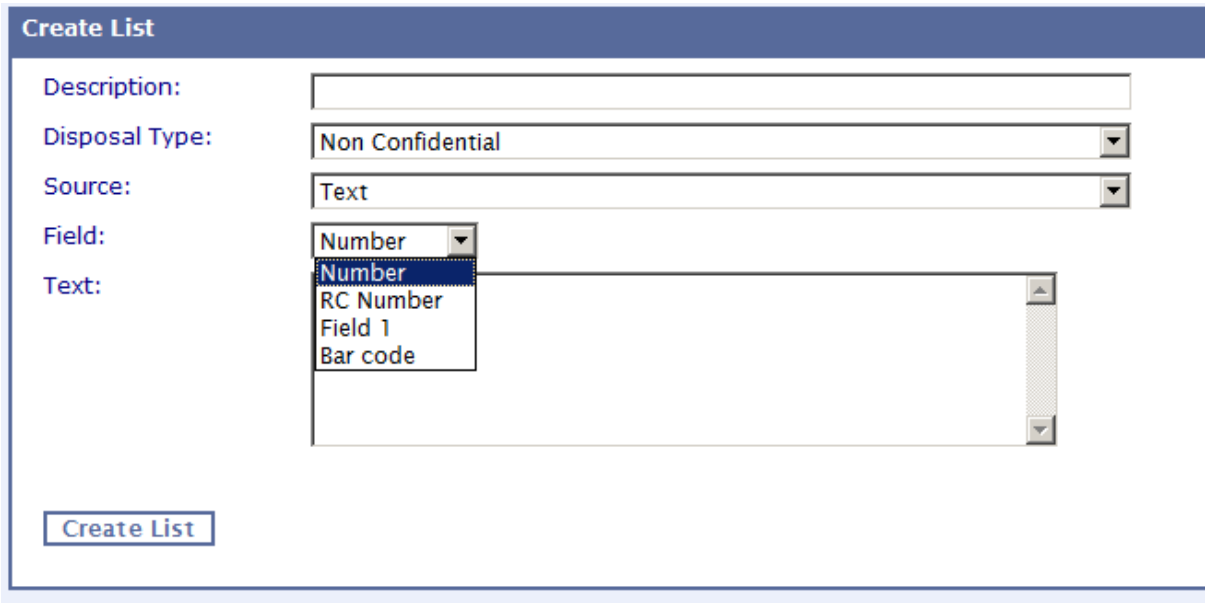

As you can see you can choose from 4 different fields to enter your data (Box Number, Box RC Number, Field 1, Bar Code). You can only populate your list with one type of field at any one time. You cannot enter some data as "Box Numbers" and others as "Bar Code" for example.

When entering data in the "Text" field, you **HAVE** to enter them one per line like so:

148
149

as opposed to having them on the same line separated by commas for example like:

148,149

Having them on the same line like this won't work.

If you choose the "Auto Create" method, you will get a screen like this:

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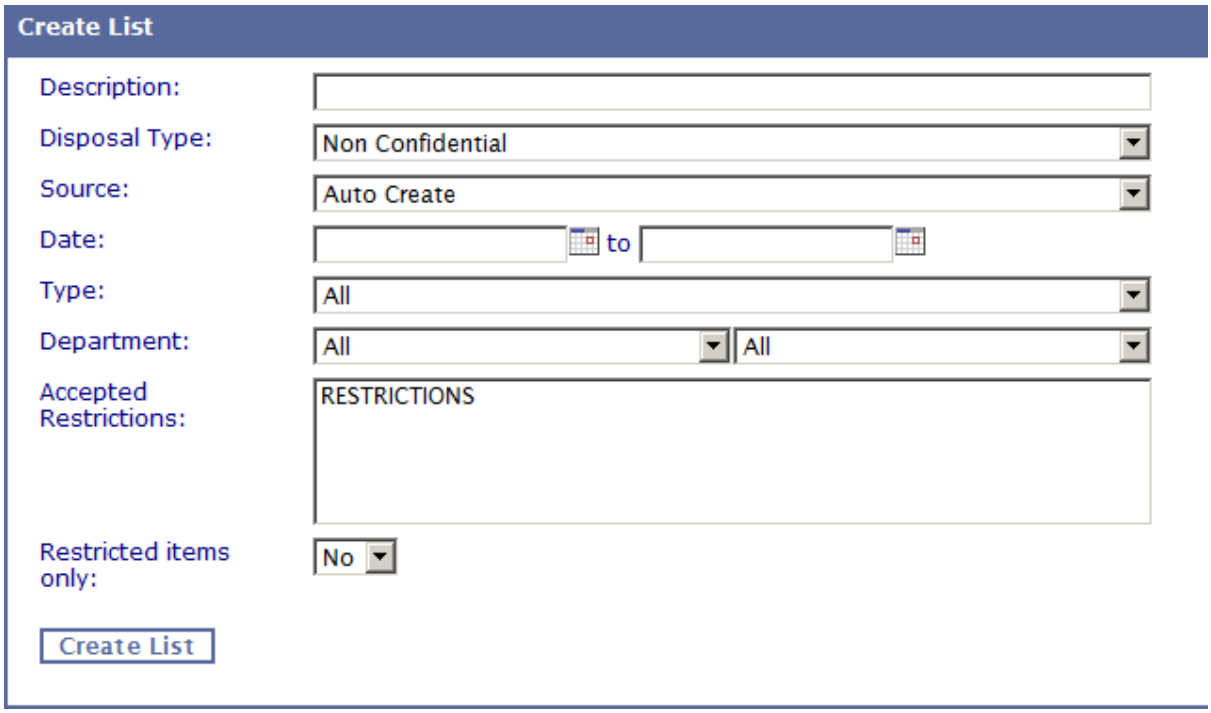
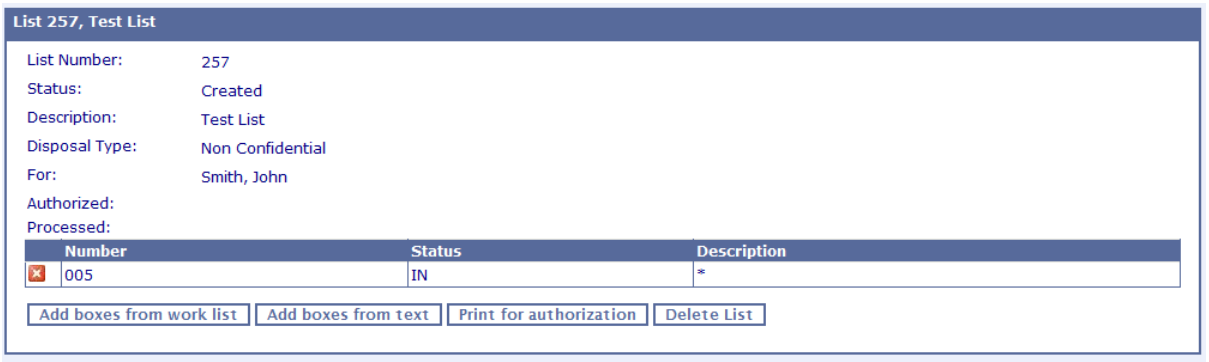


Here you simply enter the date range for which boxes are due to be destroyed and then fill in the rest of the field according to your disposal needs. Whether you choose the "Work List", "Text", or "Auto Create" method for creating your list, once the list is created you will see something like this:



From here you can add or delete boxes to the list until your satisfied with it. The next step will then be for you to "print the list for authorization" so that you can get the signing officer to sign the list and then send the list back to your record center so they can proceed to the disposal of the items on the list.

When you click the "Print for authorization" button, a new window will appear with the authorization report like so:

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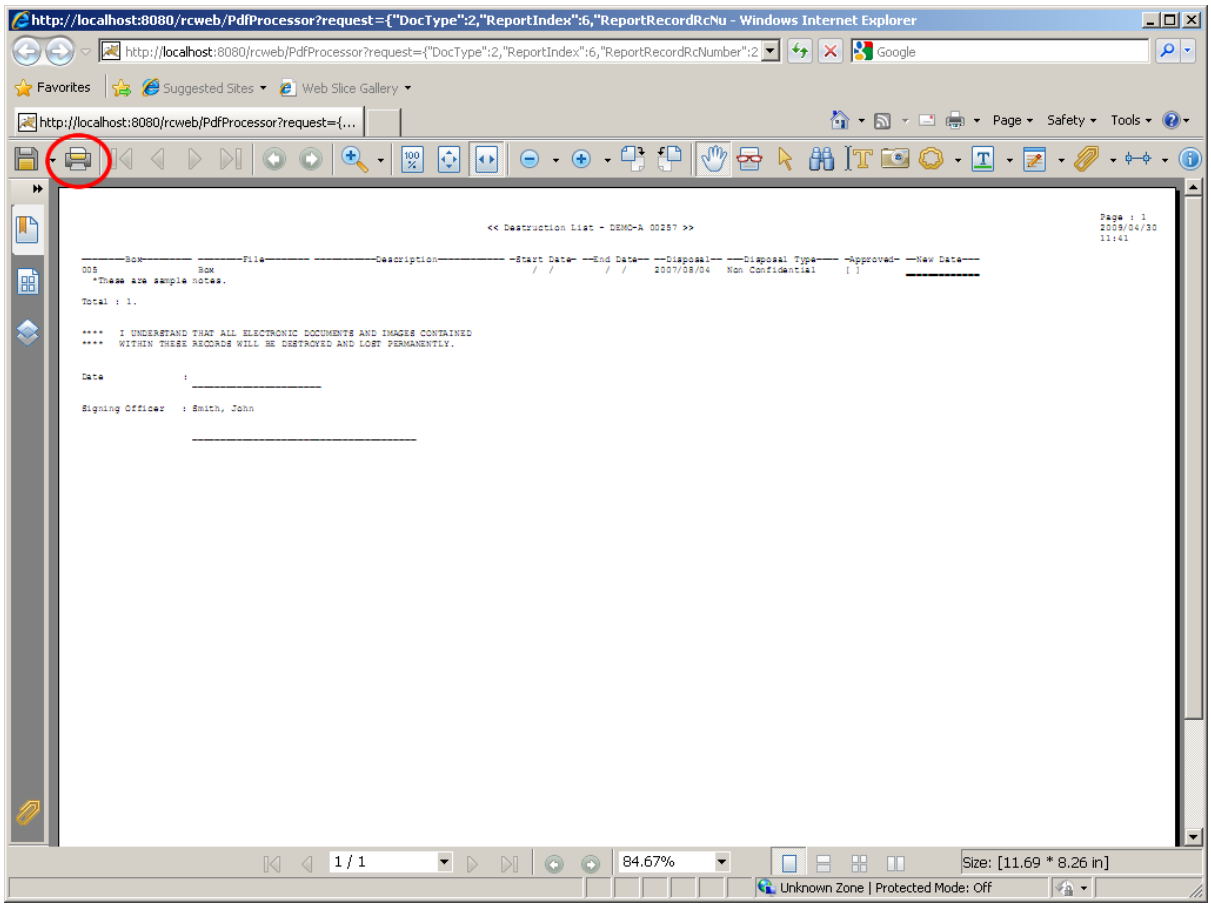
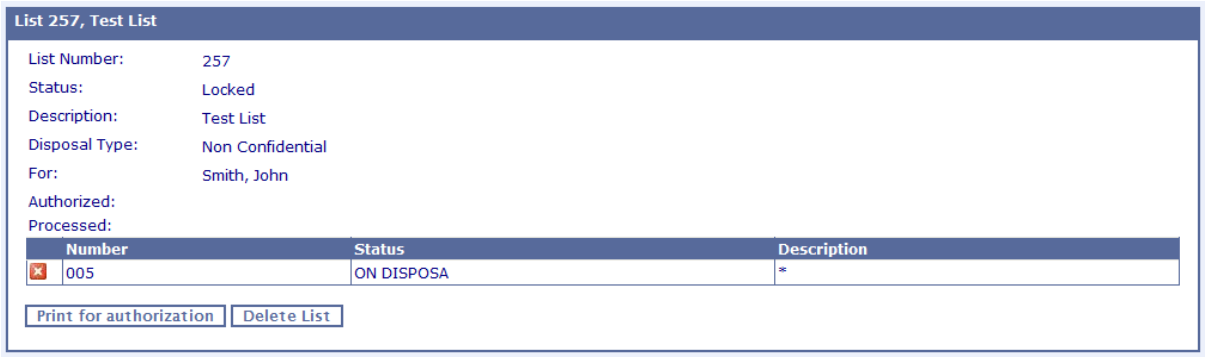


From here you can print the report by using your browser's printing ability as shown in the picture above.

Note that once the list has been printed for authorization, the list's state goes from "created" to "locked" and no more items can be added to the list (see picture below). You can remove items but not add any more. If you wish to add more you can either "delete" the list before it gets authorized and start over or just put your new items on a new list.



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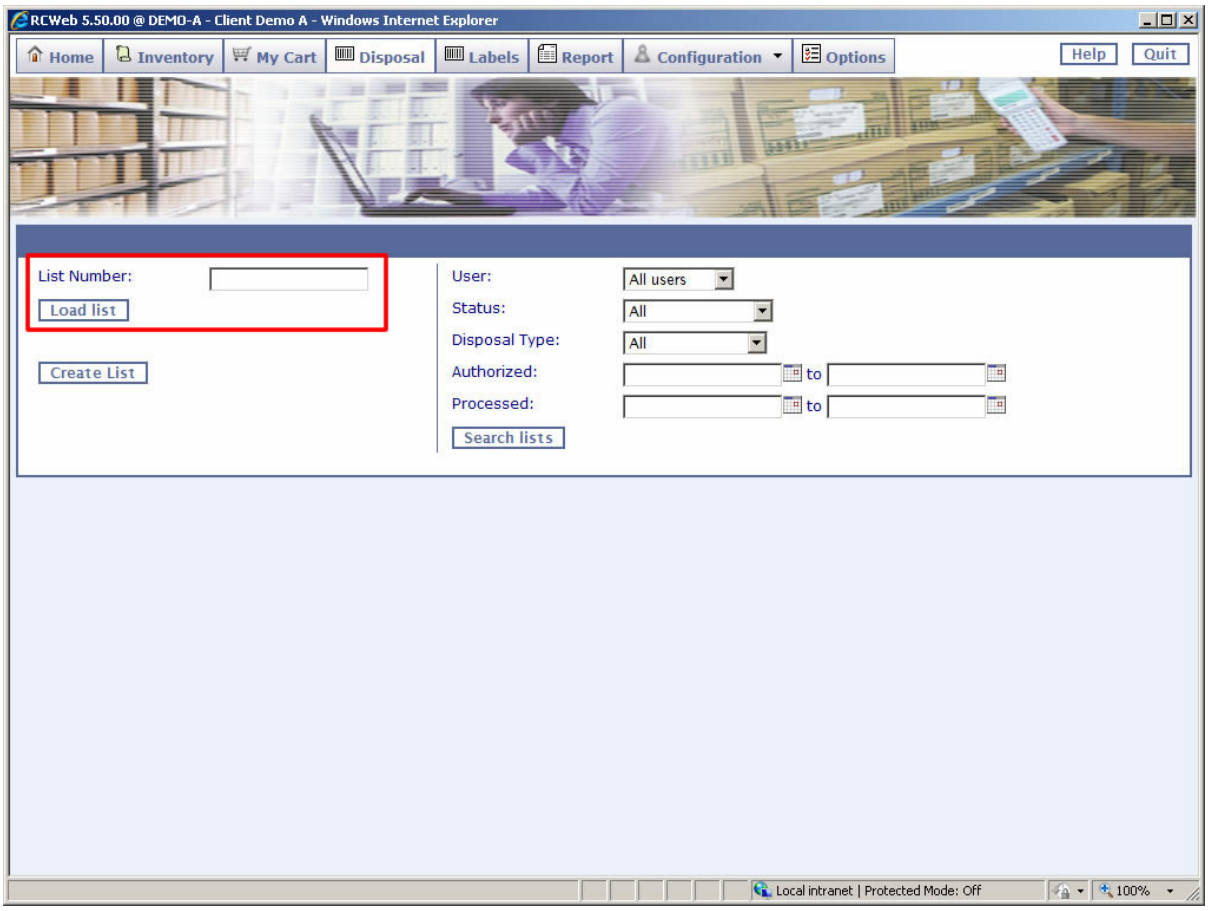
5.3 Viewing/Editing an Existing List

To view an existing disposal list simply enter the list number in the "List Number" field and click on the "Load List" button to view it. If you don't know the list number you will have to search 52 the list instead.



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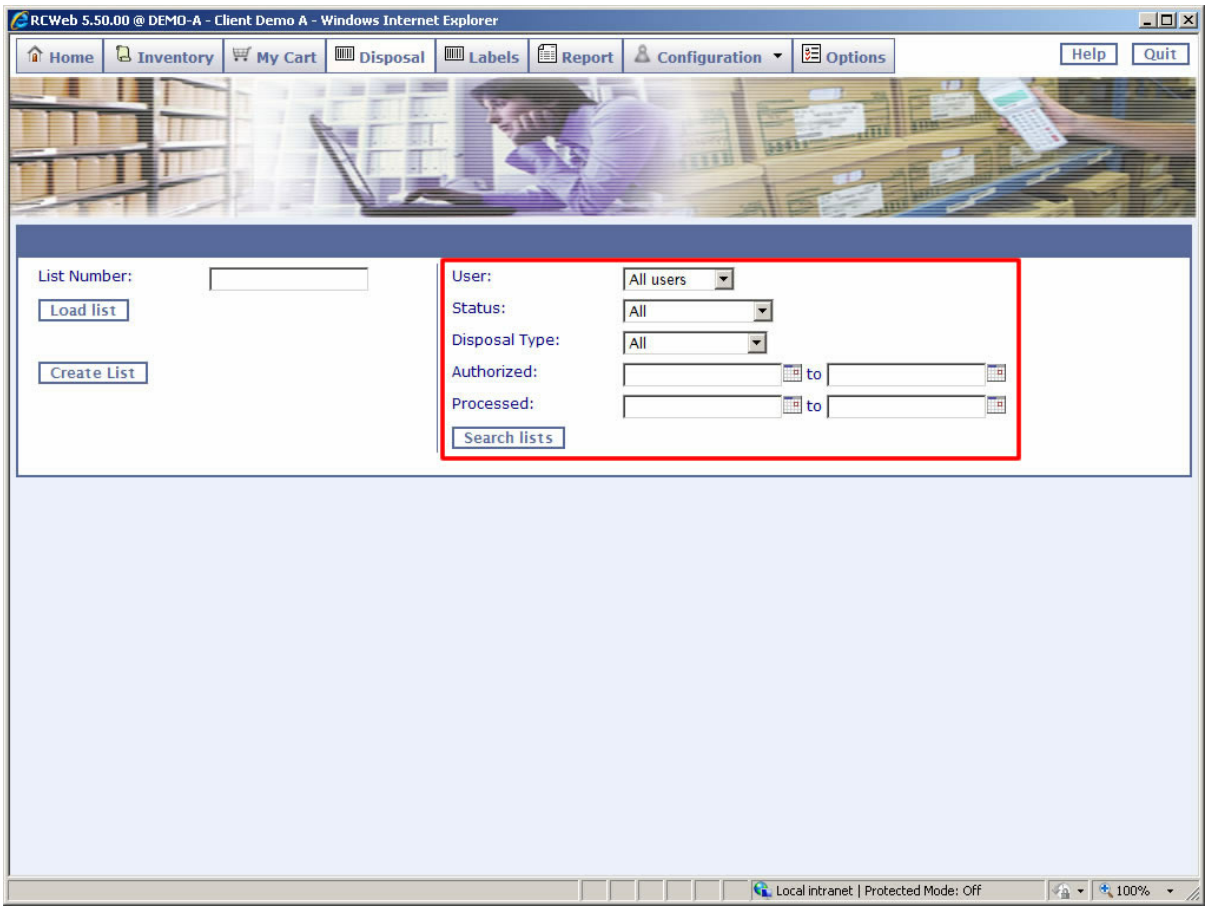
5.4 Searching For an Existing List

You can search disposal lists by using the different search criteria as seen in the picture below. Alternatively if you already know the list number you are looking, you can simply load 51 the list.



Specifically you can:

- Search lists created by the currently logged in user or all users
- Filter on different list status such as created, locked, authorized or destroyed
- Filter lists based on their disposal type
- Filter based on the authorized and/or processed date range

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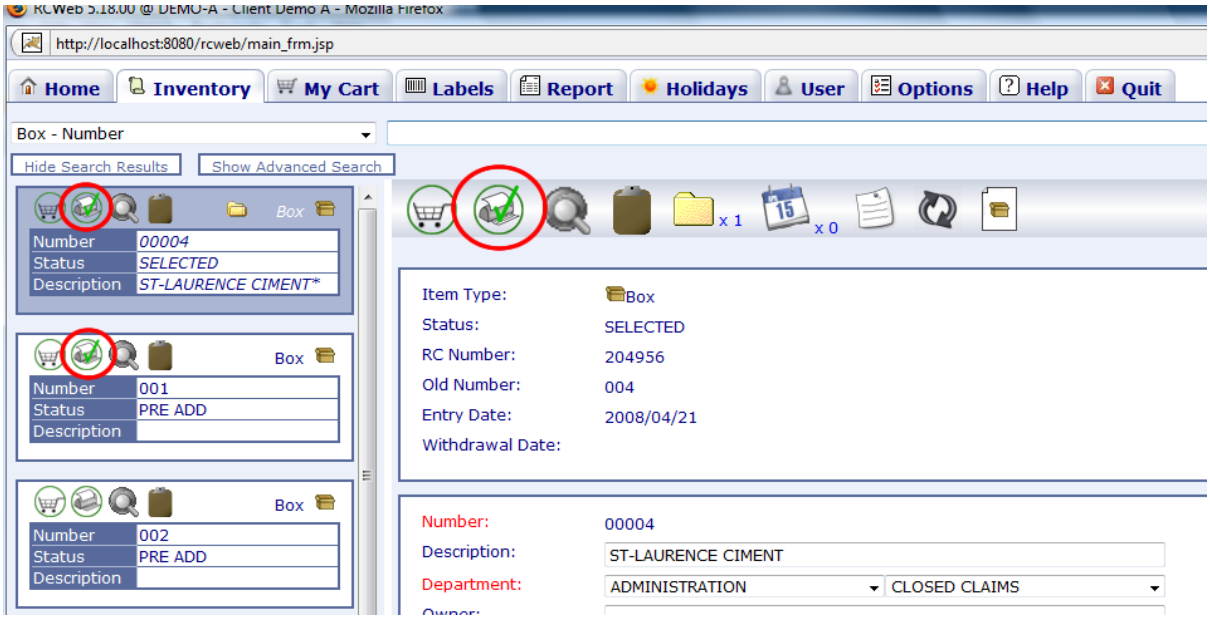
6 Labels Tab

6.1 How to Print Labels in RCWeb

EDC RCWeb enables you to print your own labels for boxes and files if you have a printer in your office. The labels are printed on Avery sheets. The Avery models available in RCWeb are defined by your record center. If you wish to use a specific Avery model other than the default ones, ask your record center to see if that model is available in RCWeb. If it is your record can make it available to you on demand.

Printing labels in RCWeb is very simple. Just follow the steps below:

1- Add boxes and/or files to the print list by pressing the "printer" icon from the inventory tab on the items you wish to add. Here is a picture to illustrate:



2- Then when you've added all the items you want to print you browse to the "Labels" tab. You'll see a screen similar to this:

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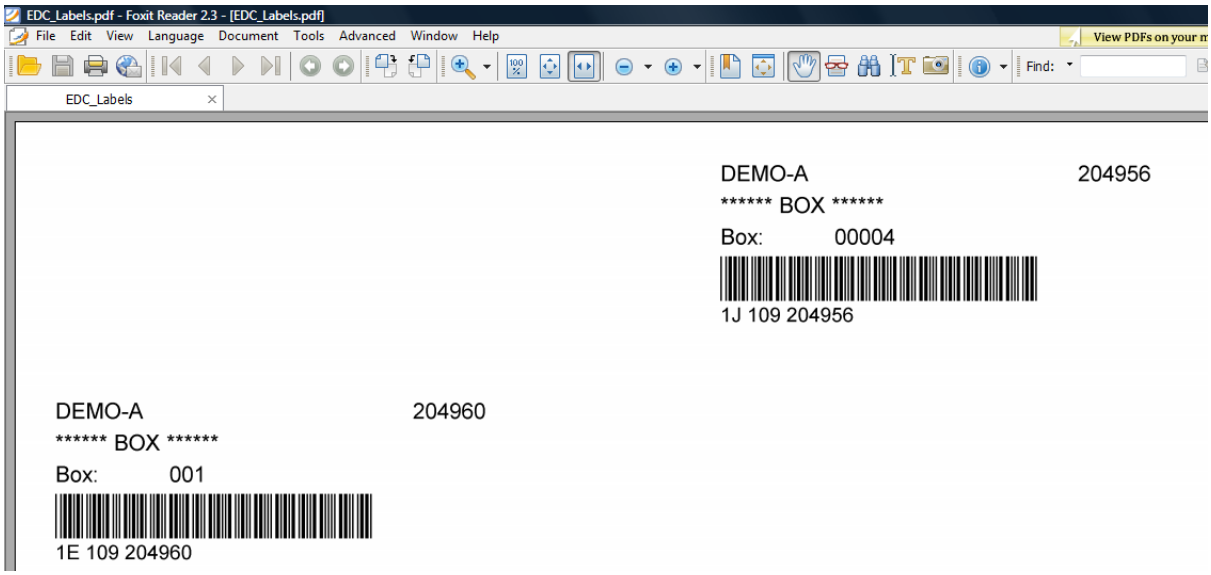
Here you can remove individual labels (or all) from the print list if you made a mistake in step 1. Then you simply choose the appropriate Avery label format from the drop-down menu and the print start position of the first label of the sheet. This can be useful for not wasting Avery sheets that already have some labels taken off.

For example if we said to start printing from position 2, the labels on the sheet would print something like this:



3- When you are ready to print your labels simply press on the "Print" button to start printing.

This concludes the section on label printing.

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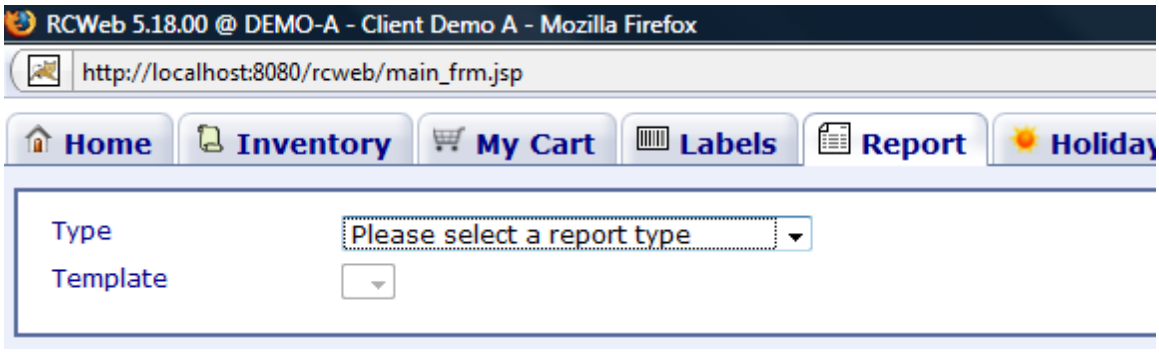
7 Report tab

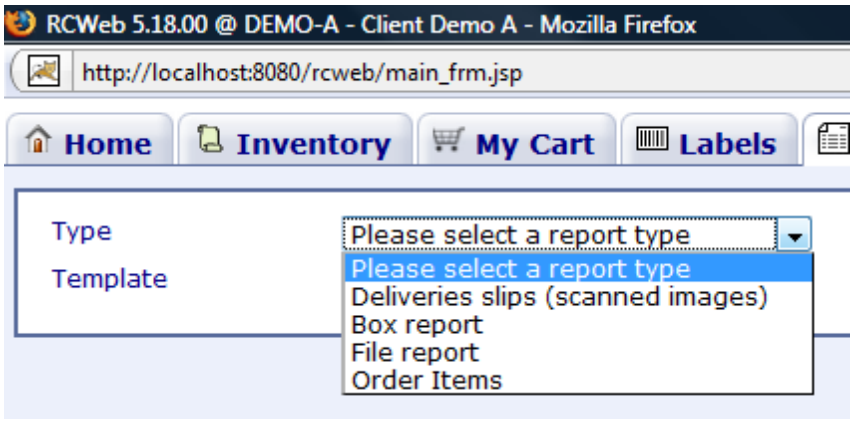
7.1 How to Create Reports in RCWeb

The reports tab in RCWeb enables you to browse 4 types of reports:

- Delivery slips (scanned images)
- Ordered items
- Box Inventory
- File Inventory

When you first open the report tab you will see this drop-down box from which you can choose the different report types:





Viewing Delivery Slips

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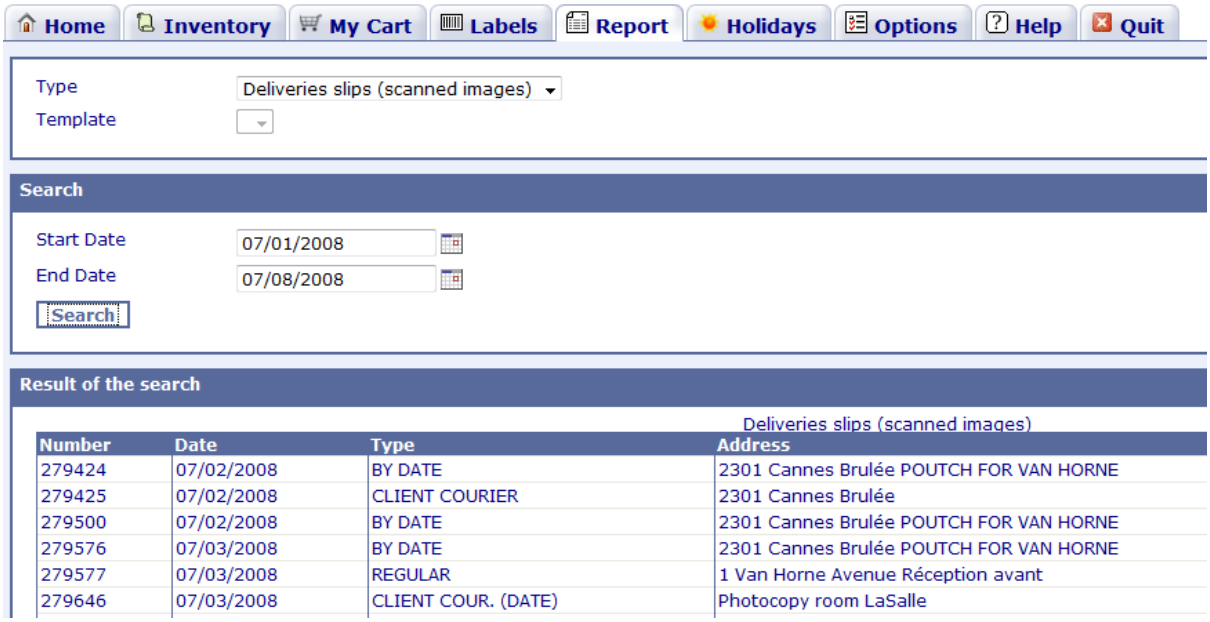

Here the procedure is quite straight forward. All you have to do is search for a date range at which you know a delivery was likely to have occurred. You can click on the "calendar" icons to input the date range and then press the "Search" button when ready. If there is some matches to your search you will see a list of delivery slips like in the picture above.

When you click on one of these, a PDF file will be generated contained the imaged delivery slip and you'll be prompted to either download or open it.

Generating Boxes and/or Files Reports

Here the process is the same for boxes or files so I will just show and example for boxes.

You can either choose a pre made template that your record center may have generated in advance for you or you can build the report from scratch. If the record center generated some templates for you, you will see them appear in the drop-down field called "Template" as in the screenshot below:

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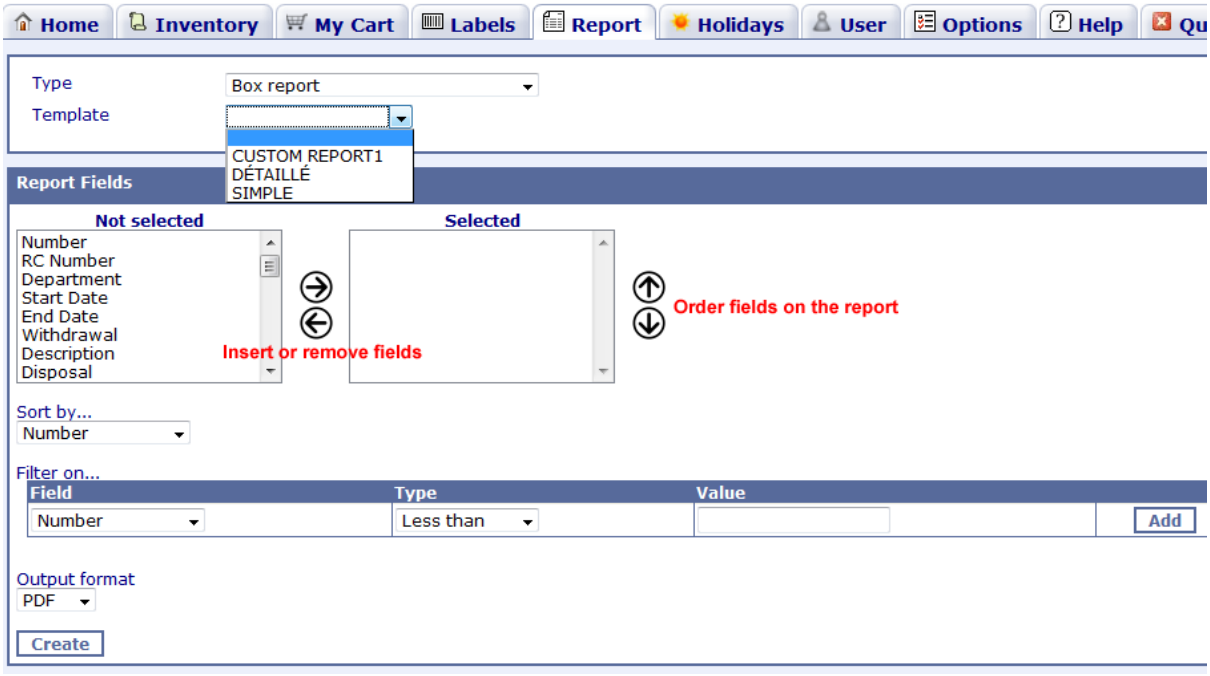
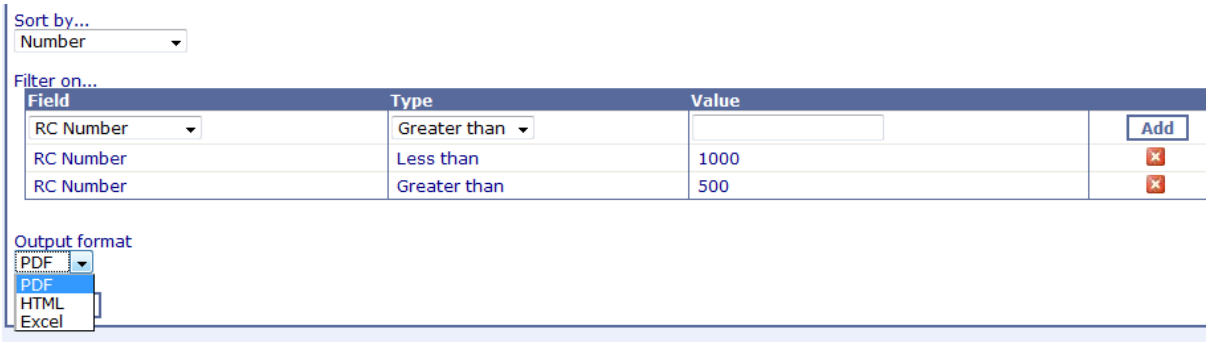


If you don't want to use one of these templates and you want to create your own from scratch, all you have to do is "select" some fields from the "not selected" side and move them to the "selected" side. Once selected you can also change the order in which the fields are going to appear on the report.

Then when you fields are selected you can choose which field the report is going to be sorted by, the output format (PDF, HTML or Excel) like in the next picture. You can also add filters your search on several fields as you can see below.



To add a filter you simply choose which field to filter by in the drop down menu, the type of filter (<, >, = etc..) and a value if needed and you press the "Add" button to add the filter.

Once you are done you simply press the "Create" button to generate the report.

Viewing Ordered Items

To view what was ordered during a specific time period, you choose the "Order Items" report from the "Type" drop-down menu and you simply filter on a date or date range like in the picture below:

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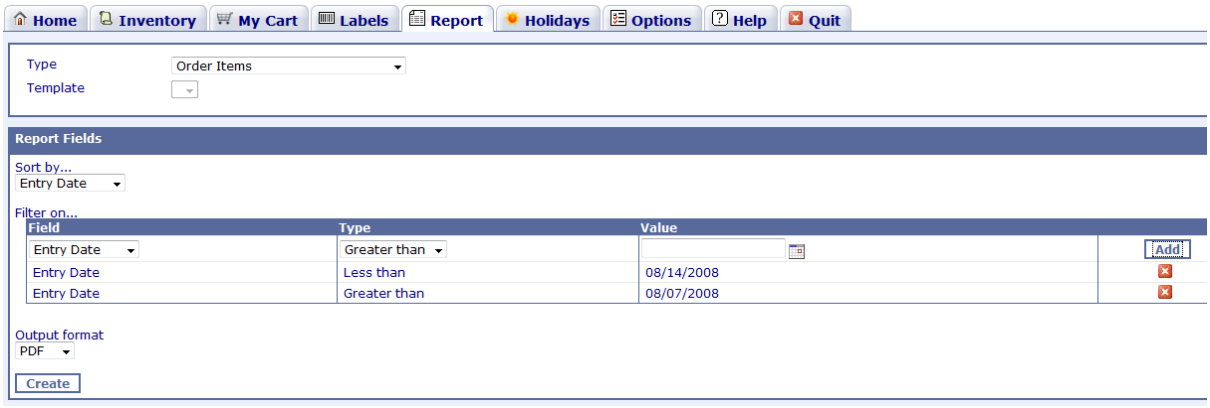
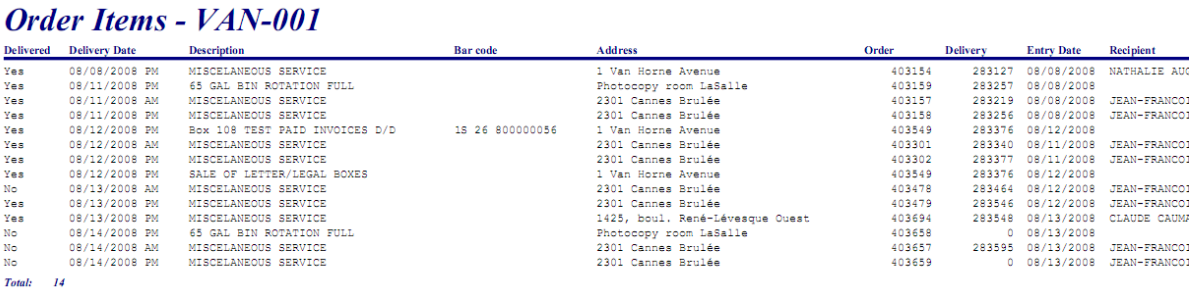


Again here you can sort the report by various fields and you can also choose a specific output format. When you press the "Create" button, the report will output something similar to this:



Order Items - VAN-001

Delivered	Delivery Date	Description	Bar code	Address	Order	Delivery	Entry Date	Recipient
Yes	08/08/2008 PM	MISCELANEOUS SERVICE		1 Van Horne Avenue	403154	283127	08/08/2008	NATHALIE AUC
Yes	08/11/2008 PM	65 GAL BIN ROTATION FULL		Photocopy room LaSalle	403159	283257	08/08/2008	
Yes	08/11/2008 AM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403157	283219	08/08/2008	JEAN-FRANCOI
Yes	08/11/2008 PM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403158	283256	08/08/2008	JEAN-FRANCOI
Yes	08/12/2008 PM	Box 108 TEST PAID INVOICES D/D	1S 26 800000056	1 Van Horne Avenue	403549	283376	08/12/2008	
Yes	08/12/2008 AM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403301	283340	08/11/2008	JEAN-FRANCOI
Yes	08/12/2008 PM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403302	283377	08/11/2008	JEAN-FRANCOI
Yes	08/12/2008 PM	SALE OF LETTER/LEGAL BOXES		1 Van Horne Avenue	403549	283376	08/12/2008	
No	08/13/2008 AM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403478	283464	08/12/2008	JEAN-FRANCOI
Yes	08/13/2008 PM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403479	283546	08/12/2008	JEAN-FRANCOI
Yes	08/13/2008 PM	MISCELANEOUS SERVICE		1425, boul. René-Lévesque Ouest	403694	283548	08/13/2008	CLAUDE CAUM
No	08/14/2008 PM	65 GAL BIN ROTATION FULL		Photocopy room LaSalle	403658	0	08/13/2008	
No	08/14/2008 AM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403657	283595	08/13/2008	JEAN-FRANCOI
No	08/14/2008 PM	MISCELANEOUS SERVICE		2301 Cannes Brulée	403659	0	08/13/2008	JEAN-FRANCOI

Total: 14

That completes the section on reports.

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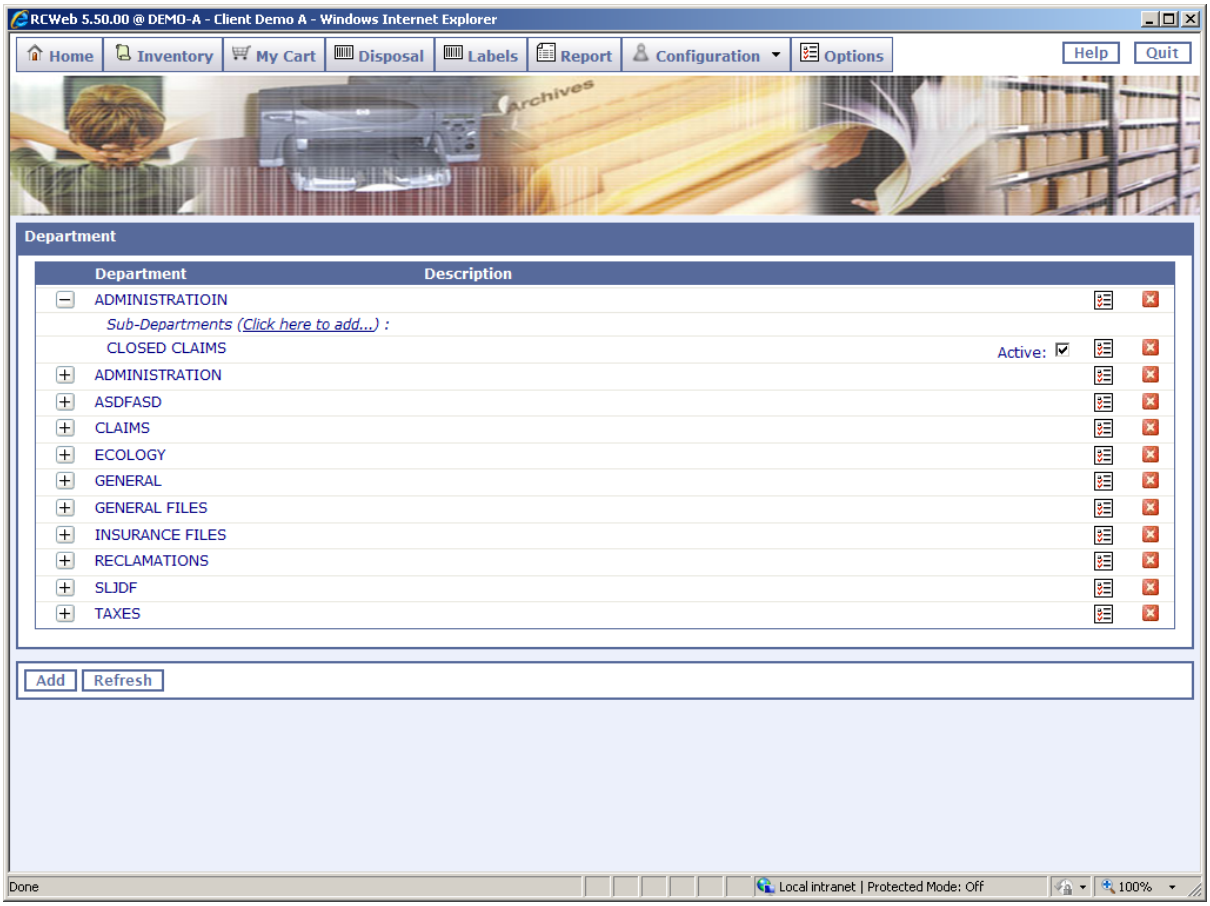
8 Configuration Tab

8.1 Departments

You can now manage departments from within RCWeb. Here's a picture of what you might find when entering the department module of RCWeb:



Here you can add, edit and delete main and sub departments.

Note: You might not have the option to edit or delete departments. This will happen if:

- Your company has a copy of DocuData's EDC ActiveFile Software installed and replicated with your record center.
- Your user settings at the record center prevents you from editing departments.

Adding and Editing Departments

Whether you are adding a new department or editing an existing one, the interface is the same for both. Here's what it looks like:

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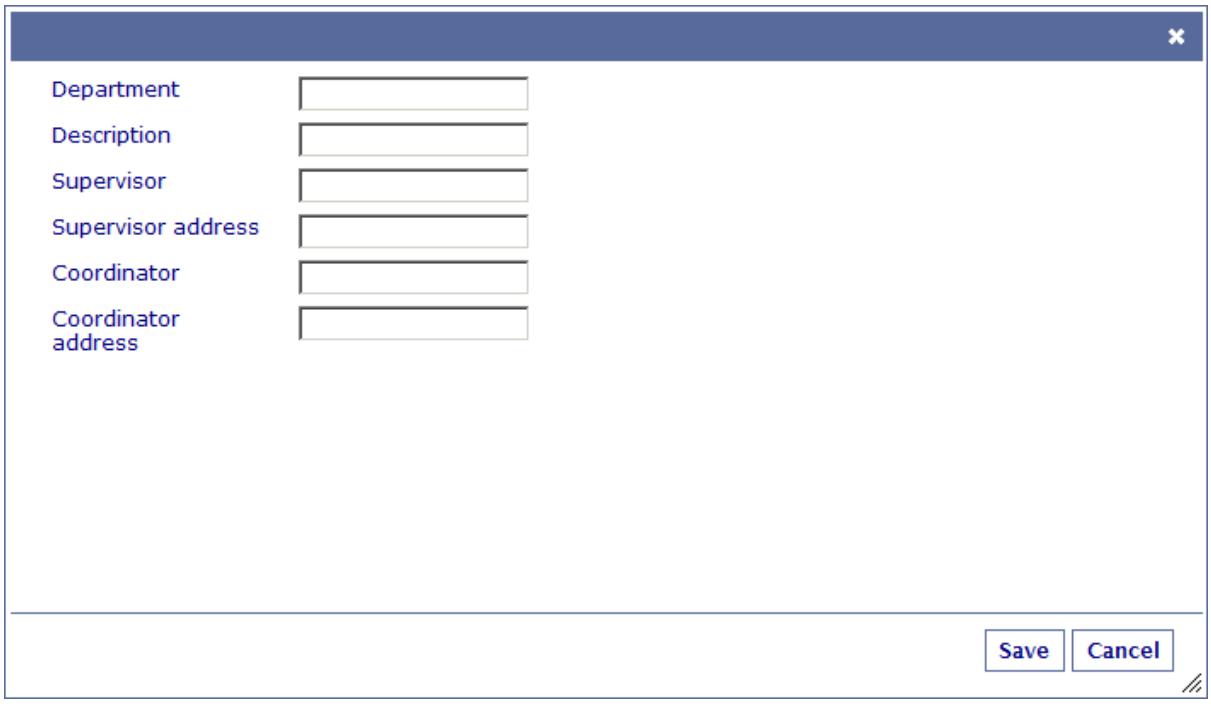
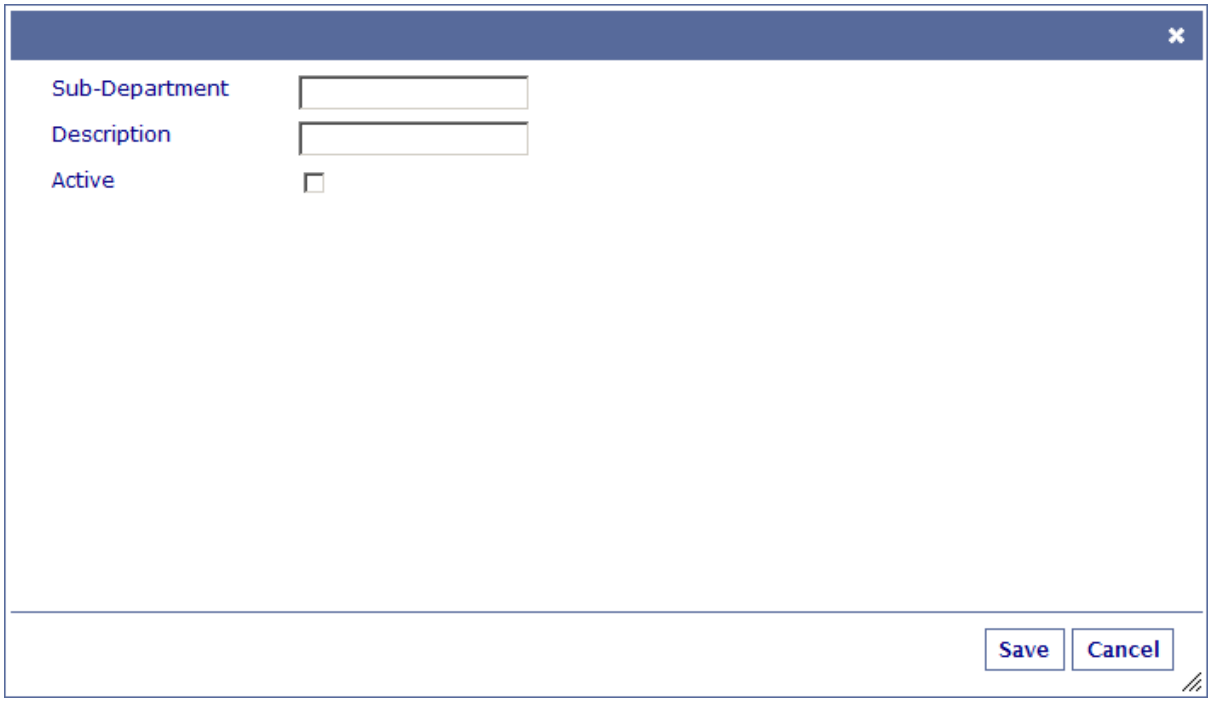


From here you simply fill in the fields you need to and then press the "Save" button when done.

The same idea goes for editing or adding sub-departments:



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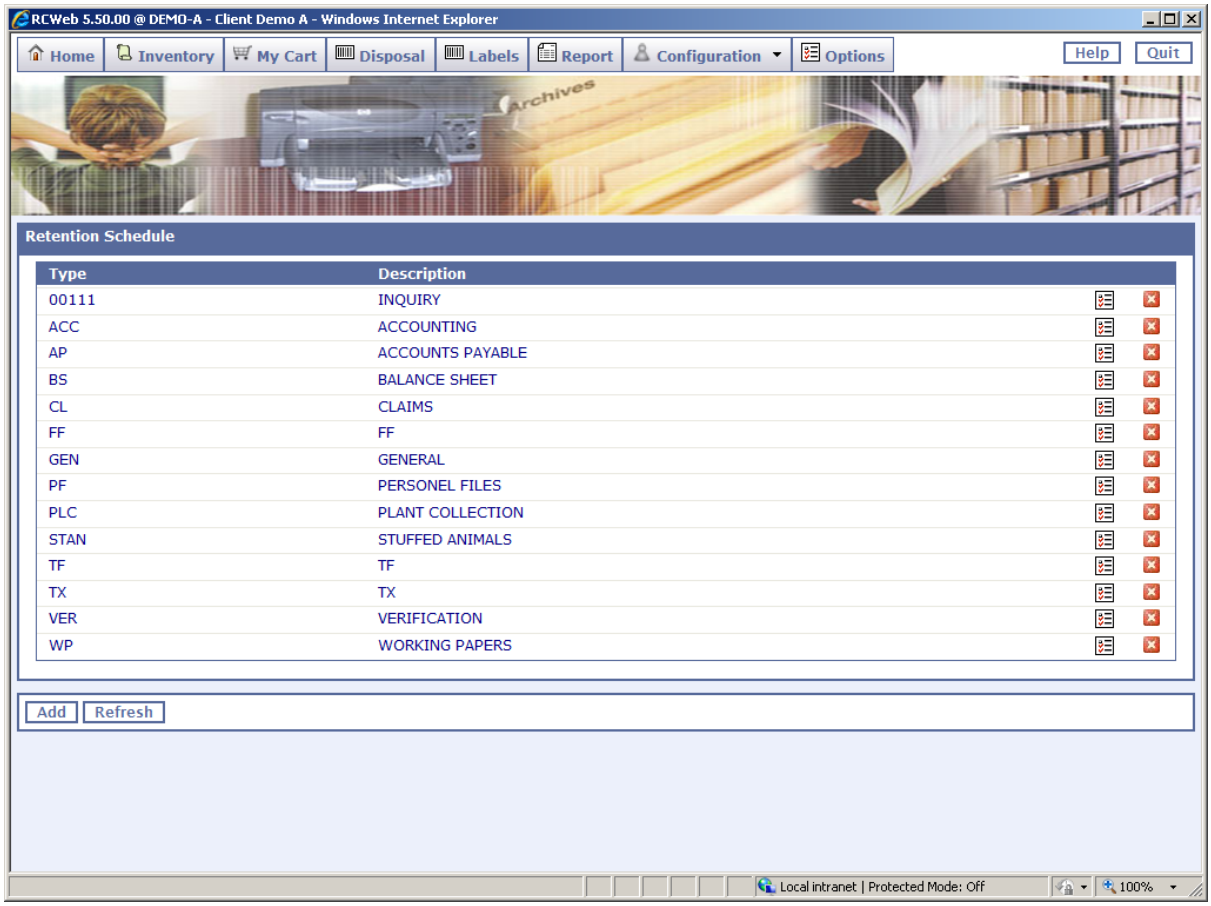
8.2 Retention Schedules

You can now manage retention schedules (document types) from within RCWeb. These types are used to classify records, to calculate their disposition dates and to specify their disposition mode. Here's a picture of what you might find when entering the retention schedules module of RCWeb:



Here you can add, edit and delete retention schedules.

Note: You might not have the option to edit or delete retention schedules. This will happen if:

- Your company has a copy of DocuData's EDC ActiveFile Software installed and replicated with your record center.
- Your user settings at the record center prevents you from editing retention schedules.

Adding and Editing Retention Schedules

Whether you are adding a new retention schedule or editing an existing one, the interface is the same for both. Here's what it looks like:

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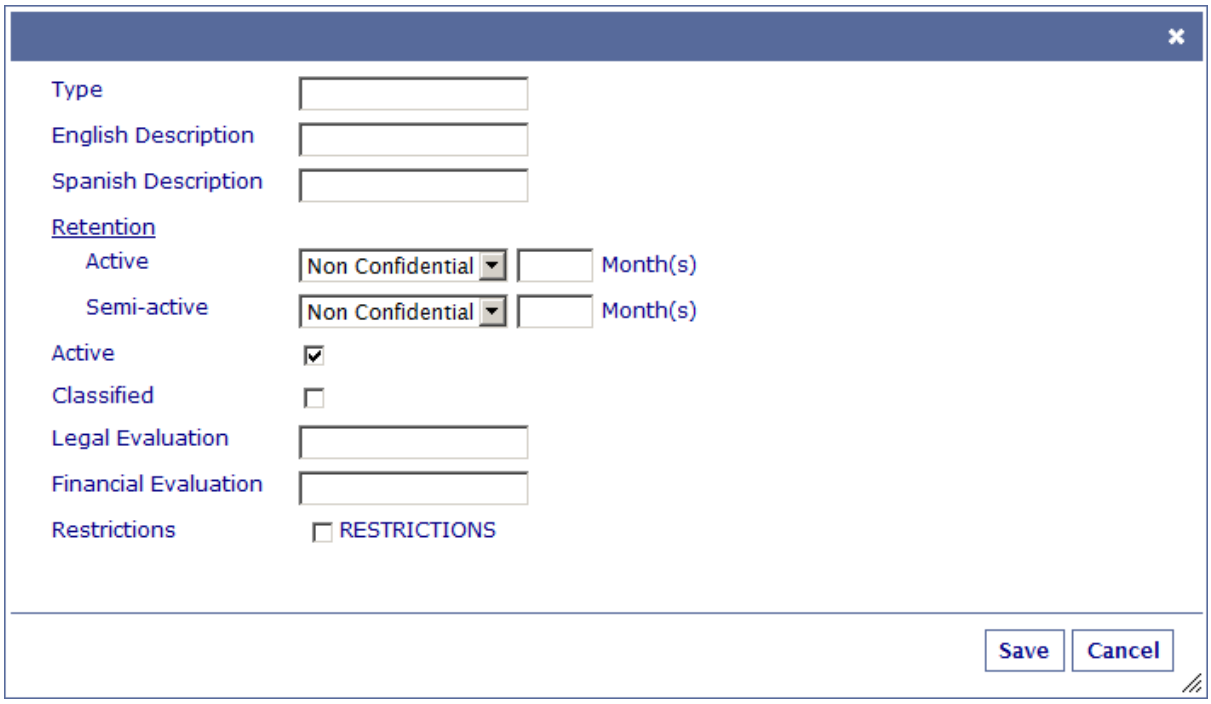

From here you simply fill in the fields you need to and then press the "Save" button when done.

Here is a description of the fields you see on this screen:

Type

This field indicates the name of the document type. This value will appear in the drop-down list associated with Type field of the boxes and files from the inventory modules.

English and Spanish Descriptions

These fields give the English and Spanish descriptions of the document type.

Retention

Active
This field indicates the active retention period for boxes and files of the selected type.

Semi-Active
This field indicates the semi-active retention period for boxes and files of the selected type.

Disposal Modes

Active
This field indicates how the documents will be disposed of at the end of their active retention period.

Semi-active
This field indicates how the documents will be disposed of at the end of their semi-active retention period.

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The following list describes the disposal modes :

CONFIDENTIAL
These documents will be disposed in a confidential manner.

NON-CONFIDENTIAL
These documents will be disposed in a non-confidential manner.

NONE
A disposal mode has not been determined.

PERMANENT
These documents will never be disposed of.

REVISION
These documents will be placed on a list so that they can undergo a special verification before being disposed of.

SAMPLE
These documents will be placed on a list so that samples can be extracted before disposing of the remaining items.

SEND TO DEPOT
Documents must be sent to another storage area, different from the off-site record center, where they will be stored indefinitely. From that moment on, the off-site record center will no longer responsible for the conservation of the documents.

Active

When this field is "unchecked", this type is set as inactive and can no longer be associated to documents.

Classified

This field indicates that the document has a classified status.

Restrictions

Field containing the values defined in the Restriction module at the record center.

This field is viewable only when the Restriction Integrity field of the Customer Information module is set to "Yes" at the record center, and when the customer is not electronically linked to the record center via the EDC ActiveFile Software. This field indicates the restrictions associated with the selected type.

Legal Evaluation

This field indicates how long the document needs to be conserved from a legal point of view.

Financial Evaluation

Indicates how long the document needs to be conserved from a fiscal point of view.

Note: the "Classified", "Legal Evaluation", "Financial Evaluation" and "Restrictions" fields are

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optional when creating a retention schedule.

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8.3 Users

The user section allows the addition of new users to RCWeb and also allows existing users info to be edited. When you first open the User tab this is what you see:

Note: Not every user have access to the "user" tab because of its administrative features. If you think you require it just ask your record center to give you access to it.

Adding users

To add a new user you simply fill the "Add New User" form and press the "Add New User" button when done like so:

When the user gets added you'll see a message like so:

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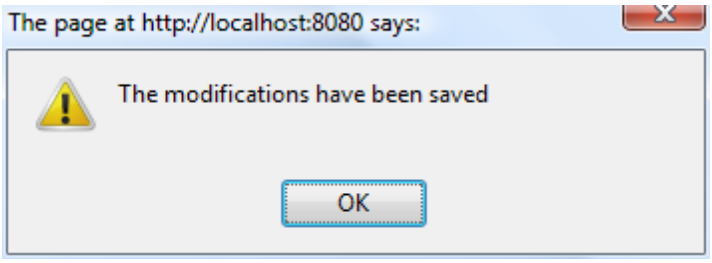

Editing an existing user

To edit an existing user you fist have to search which user to edit. When the user is found its details will be shown like in the picture below:

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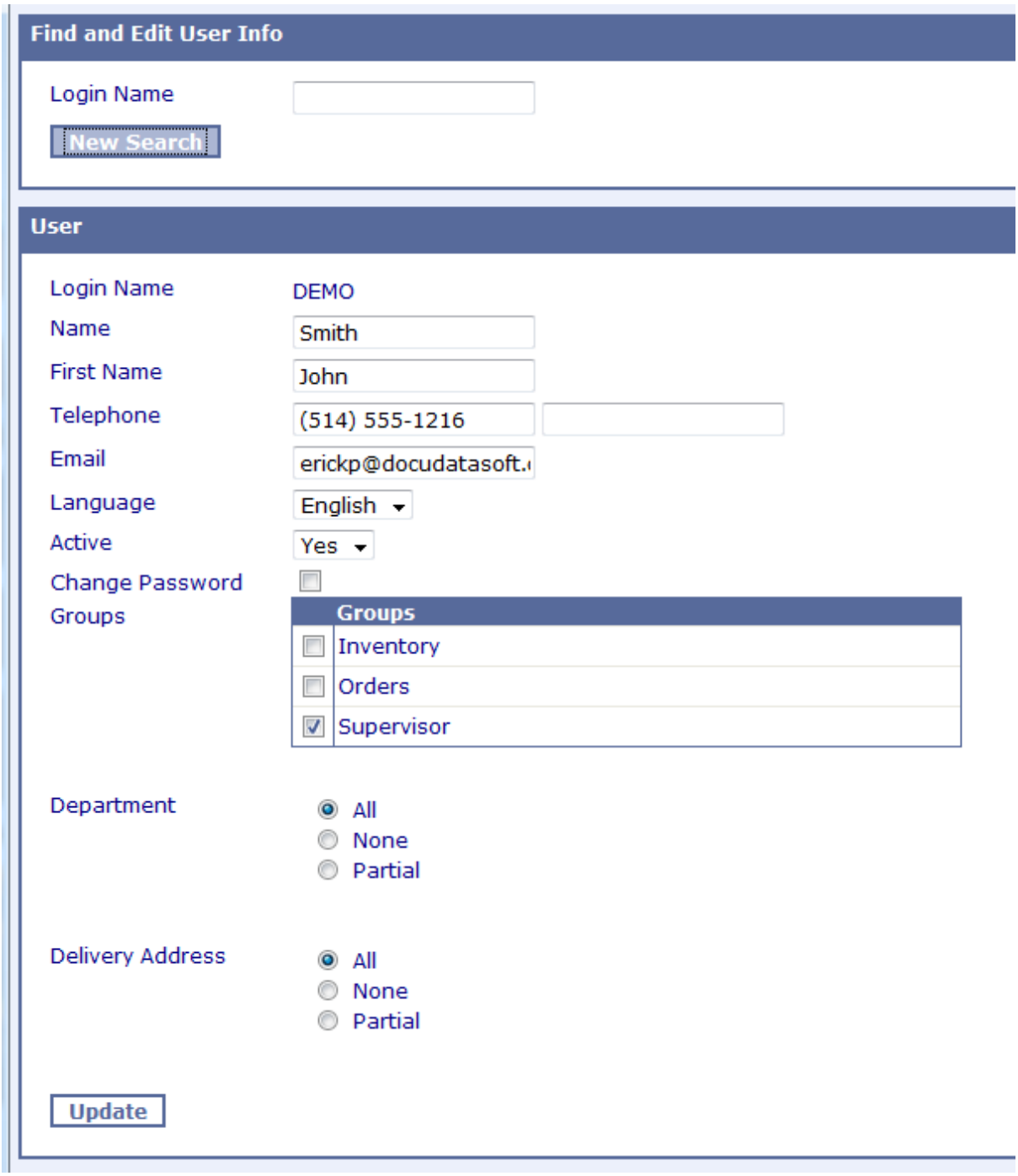

At this point all you have to do is make the appropriate modifications and click the "Update" button when done.

This concludes the section on Users.

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8.4 Holidays

Viewing and managing holidays in RCWeb is very straightforward. The "Holidays" section is divided in two parts. The upper part shows the holidays defined at your record center. The bottom part shows your holidays. You can easily tell which is which because the record center holidays have the words "Record Center" next to them AND you cannot edit them as opposed to yours.

If you need to add or delete one of your holidays, you can simply add one with the "Add New Date" form and/or delete the ones you already have with the red X next to a holiday.

Note: Holidays coming up in the next 7 days are also shown on the home page of RCWeb when you log in.

That concludes the section on holidays.

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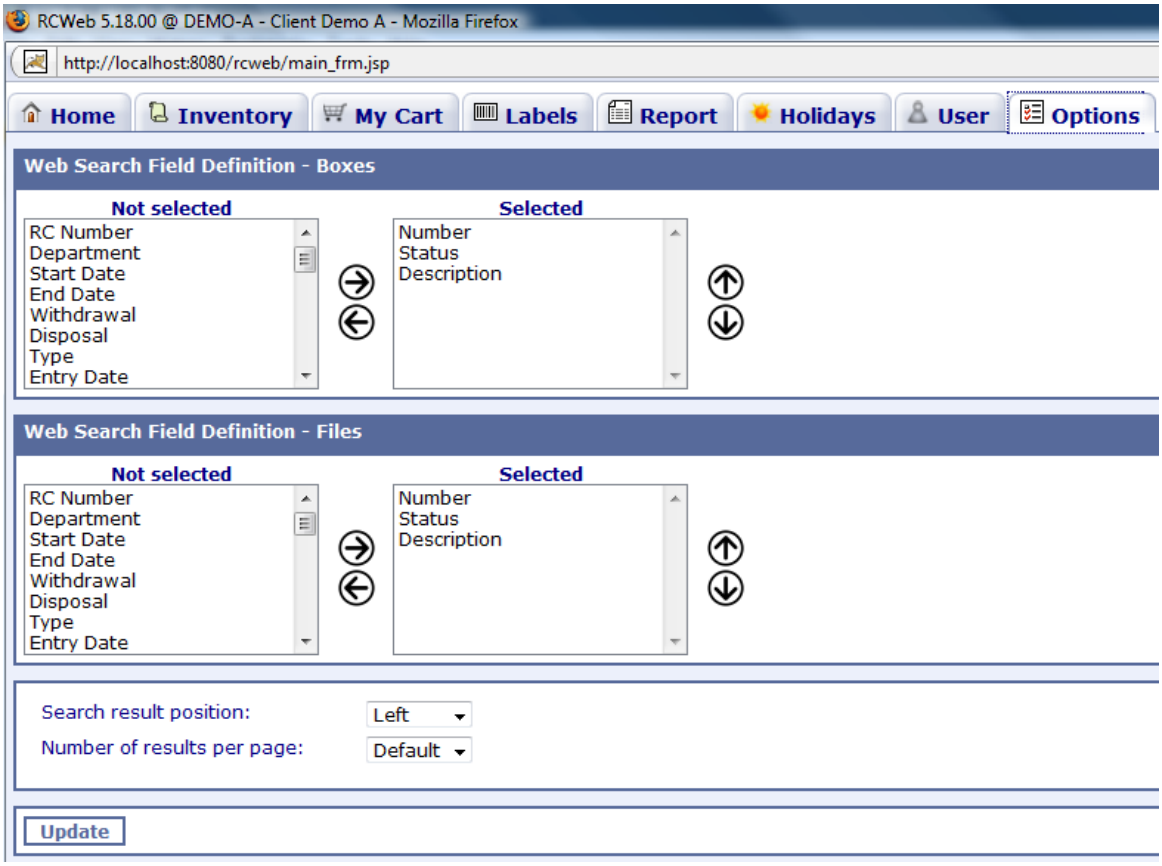
9 Options tab

9.1 Options Overview

The options tab enables you to change some aspect of the user interface inside the "Inventory" tab. Particularly you can choose which fields are displayed in the search results, the location of the search results and the number of results per page.

Here is what you see when you open the "Options" tab:



As you can see the options are pretty straight forward. You simply put the fields you need in the "selected" area for both boxes and files by using the arrows. You can also choose the order of the fields with the up and down arrows.

Note that the "default" number of results per page is 10.

Here is a picture that explains what these options modify:

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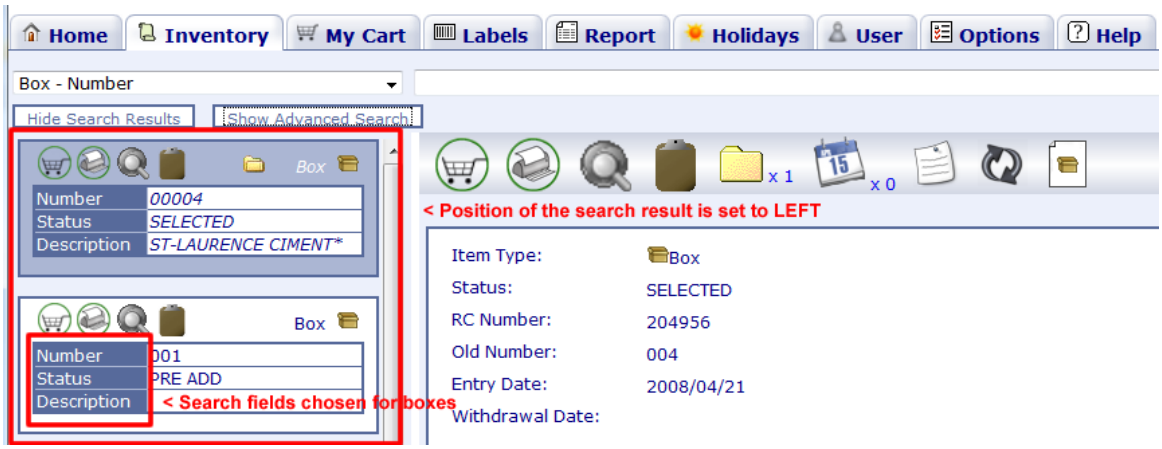

This concludes the section on Options.

If you have any comments or questions on this manual please write to support@docudatasoft.com

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